

With access to the monthly **STEP Insider**, readers receive the latest news about STEP Canada, branch and chapter activity, national event updates, recent practitioner opportunities, education information, and more!

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16th Annual STEP PRIVATE CLIENT Awards CANADIAN FINALISTS

We are thrilled to recognize the three Canadian finalists for the 16th Annual STEP Private Client Awards in the following four categories.

Congratulations to:

NIKA LAW LLP
Boutique Firm of the Year
and

Vulnerable Client Advisory Practice of the Year

Clark Wilson LLP
Contentious Trusts and Estates Team of the Year (midsize firm)

KPMG Private Enterprise
Family Business Advisory Practice of the Year

The winners will be announced at the virtual ceremony on September 23rd, 2021. [Book your place here.](#)

The STEP Private Client Awards are seen as the hallmark of quality within the private client industry. Open globally to both STEP members and non-members, these prestigious Awards recognize and celebrate excellence.

Coming Soon: 2021-22 Branch/Chapter Bundles



The 2021-22 programming will once again be broadcast online as part of the Branch/Chapter Bundle, offering live and/or on-demand viewing options for all members and delegates. The six seminars included in the Bundle will deliver in-depth technical content providing excellent value and continuing education (CE/CPD) opportunities.

Save the date for the first STEP Canada seminar which is included in all Branch/Chapter Bundles:

Estate Planning Across International Borders
Wednesday, September 15th, 2021, 12:00 noon - 2:00 pm ET

Registration will be opening mid-August. Stay tuned!

23rd National Conference - CE/CPD

Thank you to the over 940 delegates that joined us for the 23rd National Conference!

STEP Canada is currently compiling all quiz results completed since June 14, 2021. If you viewed a session and completed the required CPD quizzes then you will receive your CPD certificate by August 31, 2021. Please watch your email for these certificates.

For any delegates that have not yet viewed the sessions or completed the quizzes, the archived broadcasts remain available on the app for your viewing and the applicable quizzes will remain available until June 2022.

Haven't registered for the 23rd National Conference yet? Don't worry, it's not too late! Register now to view all 13 sessions on-demand. Don't forget to complete the quizzes and receive all applicable CPD credits!

Details and Registration

Share the Benefit of STEP

Did you know?

STEP represents over 22,000 members Worldwide and over 3,000 members in Canada, and is the leading international organization for trust and estate professionals who specialize in family inheritance and succession planning. The TEP designation is an internationally recognized hallmark of professional expertise, and we are always welcoming new members to join!

If you have a colleague you think would be interested in, or benefit from STEP membership, you can share [this brochure](#) with them and invite them to contact our Member Services team at memberservices@step.ca for more information on how to join.

You can find more information on our website, [here](#).



Practitioner Opportunities

Advertising with STEP Canada's Practitioner Opportunities service offers a highly cost-effective, quick, and simple way to attract the right candidates in this industry. STEP Canada is proud to offer a Practitioner Opportunity service as a great resource for connecting the highest caliber of trust and estate practitioners to employers.

Advice Consultant, Client Needs Research - Edward Jones (Remote)

Senior Vice President of Trust - Concentra Trust (Remote)

Senior Trust Officer - Scotia Wealth Management (Toronto)

Trust Officer - TD Private Wealth Management (Nanaimo/Qualicum Beach)

Principal Trust Officer - RBC Wealth Management (Toronto)

Have questions?

**More on Practitioner Opportunities
or
Post an Opportunity**

Education Centre

Exam Sittings & Essay Submission Dates

Education Program	Exam/Essay Dates	Registration Deadlines
CETA 1	Accessible at any time	Exams must be completed within 6 months of registration
CETA 2-4	September 1, 2021 March 1, 2022	August 1, 2021 February 1, 2022
STEP Diploma Program	November 1, 2021 May 30, 2022	October 1, 2021 April 30, 2022
Essay Submission	October 1, 2021*	-

May 1, 2022

**2021 topics have been updated and can be found [here](#)*

Upcoming Branch & Chapter Events

Save the date - registration coming soon

Mon Sept 13	STEP Toronto STEPping out to Lunch 11:45 am - 1:00 pm ET Zoom	Mon Oct 4	STEP Toronto STEPping out to Lunch 11:45 am - 1:00 pm ET Zoom
Wed Oct 6	STEP Calgary TEP Talk 8:00 am - 9:00 am MT Zoom	Wed Oct 6	STEP Winnipeg TEP Talk 12:00 noon - 1:00 pm CT Zoom
Estate Planning Across International Borders September 15, 2021 12:00 noon - 2:00 pm ET As part of the 2021-22 Branch/Chapter Bundles			

[Click here to view the entire upcoming schedule for the 2021-2022 Branch/Chapter Bundle.](#)

Connect with Us

Have you connected with us on LinkedIn?

Join our online community and stay connected to your fellow practitioners and STEP Canada staff. We encourage all our members to be active and contribute through our corporate and individual branch/chapter groups. Our goal is to provide a forum for our members to explore their shared experience as trust and estate practitioners.

Follow [STEP Canada's corporate page](#).

You can find the link to your local branch/chapter group on the STEP Canada corporate page.

Need help? View the [LinkedIn Cheat Sheet](#).



Reminders

All **STEP Canada staff** are working from home until further notice. Members are encouraged to communicate with us using email. Not sure who to write to? Send any inquiry to memberservices@step.ca and our team will forward your message to the right staff member.

We would like to extend a **big thank you** for our students, TEPs, and supporting employers who see the enormous value in STEP education and membership.

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[Got Questions? Please Contact Us | Phone: 416-491-4949 ext.221 | Toll-free: 1-877-991-4949 | \[step.ca\]\(http://step.ca\)](#)

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STEP Canada
45 Sheppard Avenue East
Suite 510
Toronto, Ontario M2N 5W9
CA