



E-Newsletter Vol. 10 • Issue 8 • August 9, 2022

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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2022-23 | BRANCH/CHAPTER BUNDLE

Coming Soon: 2022-23 Branch/Chapter Bundles

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

Drafting the Inclusive Estate Plan for the Modern Canadian Family
Wednesday, September 14th, 2022
12:00pm - 2:00pm ET

Anyone unable to make the above broadcast will have access to an archived version 48 hours later.

All STEP Canada branches and chapters will once again be offering a Bundle of 6 unique technical seminars for the 2022-23 programming season. This season's Bundle will follow a hybrid model, with branches/chapters having the option to host their local sessions in-person. After 48-hours the session will then be available for e-archived on-demand viewing. The six seminars included in the Bundle will deliver in-depth technical content providing excellent value and continuing education (CE/CPD) opportunities.

More details and registration will be available mid-August.

2022-23 Membership Renewals



STEP Canada's membership renewal period for 2022-23 has now closed. We would like to extend a thank you to everyone that renewed their memberships for this upcoming year, with over 3,150 members confirming their commitment to STEP. Thanks to you, STEP Canada is strong and growing stronger.

Thank you to our students, TEPs, and supporting employers who see the enormous value in STEP education and membership.

Searchable Resource Tool (SRT)

Have you checked out STEP Canada's **new** Searchable Resource Tool?

As a member, you now have access to a library of STEP Canada content including a collection of presentation decks, formal papers, additional resources, and articles from Branch & Chapter Events, National Conferences and Webcasts, and the STEP Inside newsletter.

STEP Canada is continuing to add material to the SRT. Members can now access any National Conference presentation back to 2016, any Branch/Chapter presentation back to 2016, and any STEP Inside article back to 2015.

Access the STEP Canada SRT today by logging in to your MY STEP account.

17th Annual STEP Private Client Awards

Join STEP in-person in London on September 14th, 2022, for the 17th annual STEP Private Client Awards! This ceremony will celebrate the success and recognize the achievements of practitioners, teams, and firms from around the world.

Best of luck to the eight Canadian finalists:

TD Wealth Private Trust, Tax Services
Accountancy Team of the Year (midsize firm)

Your Digital Undertaker®
Digital Assets Practice of the Year

NIKA LAW LLP
RBC Wealth Management, Royal Trust
Employer of the Year

KPMG Private Enterprise
Family Business Advisory Practice of the Year

KPMG Family Office
Multi-Family Office Team of the Year

Whaley Estate Litigation (WEL) Partners
Vulnerable Client Advisory Practice of the Year

Lesley Donsky TEP, RBC Royal Trust
Young Practitioner of the Year

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 this excellence.

[Click here to view all 2022 finalists.](#)

[Book your table here.](#)

CE/CPD Credits for Past Events

Members are reminded that access to all apps including the 2020 Speakers' Series, 2021 Q1 & Q2 Branch Bundles, 2021 National Conference, 2021-22 Branch/Chapter Bundles, and 2022 National Conference will only be available until December 31, 2022. The PowerPoint presentations from these events will all shortly be available in the Searchable Resource Tool (SRT).

CPD certificates for the 2021-22 Branch Bundle sessions will be sent by the end of August 2022. Members who have not yet taken the quiz for any sessions they have viewed can still do so to receive their CPD credits.

CPD certificates for the 24th National Conference will be sent in August 2022.

If you have concerns regarding your credits, please email memberservices@step.ca.

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.

Senior Trust & Estate Consultant - CIBC Trust Corporation (Quebec)

Trust Officer - Solus Trust Company Limited (Vancouver, BC)

Trust Administrator - Solus Trust Company Limited (Vancouver, BC)

Trust Advisor, Indigenous Wealth - RBC Wealth Management (Winnipeg, MB; Calgary, AB; Toronto, ON; Vancouver, BC)

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, 2022 March 1, 2023	Registration closed February 1, 2023
STEP Canada Diploma Program	November 7, 2022 May 29, 2023	September 7, 2022 March 29, 2023
Essay Submission	October 1, 2022 May 1, 2023	*2022 topics can be found here (new topics will be released in January 2023)

Updates

STEP Canada is pleased to announce the launch of our new mentorship program!

With the addition of new learning resources and networking opportunities built into our diploma program, we have re-evaluated our mentorship program to ensure that STEP continues to offer a valuable experience to our members.

Our new mentorship program is focused on **career enhancement** and will aim to facilitate a relationship where knowledge and experience are shared between mentors and mentees that work in the same industry.

If you would like more information about becoming a mentor or a mentee, please email education@step.ca.

Diploma Program

The first round of peer learning sessions have been scheduled. Students should login to their course website for details and case study materials. This is an opportunity to connect and learn from your peers.

Certificates: Program completion certificates for both the Diploma Program and CETA will be mailed out to all those that have finished a STEP Canada education program between 2020 and the most recent term. The preferred address in your STEP Canada profile will be used. Please ensure this is up to date by logging in to your MY STEP account at step.ca and editing your profile information.



Connect With Us on LinkedIn

Latest post from the STEP Canada LinkedIn corporate page:

STEP Canada is thrilled to announce the latest recipients of the prestigious Trust and Estate Practitioner (TEP) designation. The below members were granted the designation in June, July, and August 2022.

The TEP designation formally distinguishes these qualified practitioners from non-specialists, and offers a competitive advantage in attracting clients.

Please join us in congratulating our new TEPs for all their hard work and dedication.

#STEP #STEPCanada #TEP #NewMembers #Education #Networking #Congratulations

Congratulations to our new TEPs!



Diploma Program

Adam Giancola, TEP, STEP Toronto
Adrian Bacchus, TEP, STEP Toronto
Alex Stemmler, TEP, STEP Southwestern Ontario
Alicia Mossington, TEP, STEP Southwestern Ontario
Althea Gomes, TEP, STEP Toronto
Audrey Jun, TEP, STEP Vancouver
Barbara Shuster, TEP, STEP Ottawa
Catherine Hung, TEP, STEP Toronto
Chloe Ajamian, TEP, STEP Montreal
Daniel Stewart, TEP, STEP Ottawa
Darla Scott, TEP, STEP Saskatchewan
Daryl Lindsay, TEP, STEP Winnipeg
Demetre Vasilounis, TEP, STEP Toronto
Denis Bisson, TEP, STEP Toronto
Edwin Yeung, TEP, STEP Vancouver
Genevieve Gay, TEP, STEP Toronto
Geoffrey Costeloe, TEP, STEP Calgary
Giselle de Sousa, TEP, STEP Toronto
Greg Marks, TEP, STEP Toronto
Holly Malley, TEP, STEP Toronto
James Bowden, TEP, STEP Toronto
Jasmine Brown, TEP, STEP Ottawa
Jennifer Schreurs, TEP, STEP Okanagan
Jessica Kristensen, TEP, STEP Southwestern Ontario
Jinsheng Yue, TEP, STEP Toronto
John Christensen, TEP, STEP Ottawa
Joseph Diletti, TEP, STEP Toronto
Joshua McWilliam, TEP, STEP Atlantic
Katherine Ann Kastrati, TEP, STEP Calgary
Katherine Mengyun Xue, TEP, STEP Calgary
Kayla Thompson, TEP, STEP Edmonton
Kimberly Vernon, TEP, STEP Calgary
Konrad Kobilewski, TEP, STEP Vancouver

Lisa Laredo, TEP, STEP Toronto
Maria Beatriz Davila, TEP, STEP Montreal
Mark Defalco, TEP, STEP Ottawa
Melissa Saunders, TEP, STEP Atlantic
Michelle Karby, TEP, STEP Vancouver
Nadia Yongeun Cho, TEP, STEP Toronto
Oxana Rebroy, TEP, STEP Toronto
Pius Omene, TEP, STEP Calgary
Rebecca Chwedoruk, TEP, STEP Edmonton
Rebecca Flynn, TEP, STEP Edmonton
Ryan Leung, TEP, STEP Toronto
Sara Tan, TEP, STEP Toronto
Sarah Macaluso, TEP, STEP Ottawa
Stephanie Battista, TEP, STEP Toronto
Steven Ambeault, TEP, STEP Edmonton
Tracy Parks, TEP, STEP Toronto
Vanessa LeBlanc, TEP, STEP Atlantic
Vienna Delonde, TEP, STEP Calgary
Xiaojing Yu, TEP, STEP Vancouver

Essay Program

Jason Melo, TEP, STEP Southwestern Ontario
Katrina Ga-Jing Leung, TEP, STEP Vancouver
Sasha Kraus, TEP, STEP Toronto
Shannon James, TEP, STEP Calgary

Expertise

Gregg Knudsen, TEP, STEP Atlantic
Holly LeValliant, TEP, STEP Toronto
Wendy Seet, TEP, STEP Vancouver

French Diploma Program

Gabrielle Lapicerella, TEP, STEP Montreal
Nadine Deschênes, TEP, STEP Montreal
Sophie Casgrain, TEP, STEP Montreal
Thomas Wujtow, TEP, STEP Montreal

Want to see more posts like this? 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.

Quick Links

[Advising Families](#)

[STEP Member Directory](#)

Got Questions? Please Contact Us | Phone: 416-491-4949 ext.221 | Toll-free: 1-877-991-4949 | step.ca