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E-Newsletter Vol. 12 | Issue 8 | August 13, 2024

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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## STEP Canada-USA Cross-Border Conference



**IN-PERSON | October 6 - October 8, 2024**  
**Chicago Marriott Downtown Magnificent Mile**

### **REGISTRATION UPDATE:**

Capacity for Canadian delegates has been reached, however we are still accepting registrants from the US! **Canadians** – do you have STEP USA Member counterparts or colleagues? [Share this event](#) with them to expand their networks!

### **MEET OUR GENEROUS SPONSORS:**

Special thanks to all the generous organizations contributing to the success of this conference. To view all the sponsoring organizations, [click here](#).

If your organization would like to sponsor this event, please explore the sponsorship kit below and email [can.us-sponsorship24@step.ca](mailto:can.us-sponsorship24@step.ca) to reserve your position.

[View Our Sponsorship Opportunities](#)

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## Searchable Resource Tool

**Reminder:** As a benefit of STEP membership, you can easily search and access content from our library, including a collection of PDF versions of presentation decks, formal papers, additional resources, and articles from Branch/Chapter seminars, National Conferences, and Webcasts, as well as articles from STEP Inside.

Since its launch in March 2022 there have been almost 10,000 individual searches, with some of the most popular search terms being "digital assets", "cross-border", "insurance", "spousal trust", "estate freeze", and "wills".

The SRT has continued to grow with over 10 years worth of content, including recent events such as the 2023-24 Branch/Chapter Bundles.

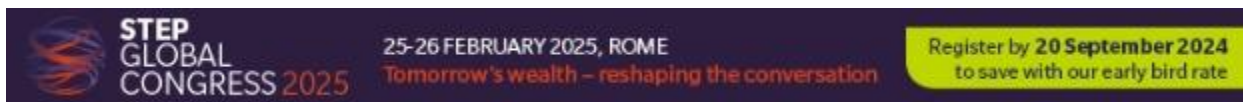
Members can access the SRT by logging into their MY STEP account.



[Login to MY STEP](#)

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## STEP Global Congress 2025

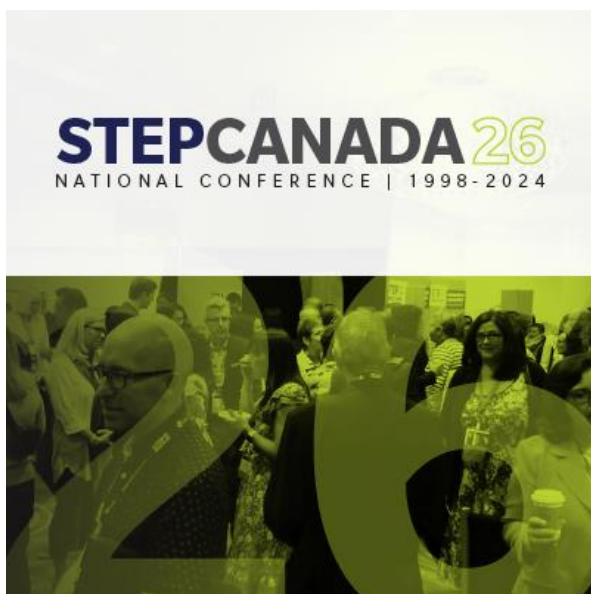


You can now book tickets for the next STEP Global Congress, which will be taking place in Rome, Italy on February 25 and 26, 2025. Congress will address the challenges and opportunities presented by the next generation of wealth holders; the fight against economic crime; and the debate over implementing a global wealth tax, offering diverse perspectives on potential impact and feasibility.

[Details & Registration](#)

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## 26th National Conference CPD/CE Certificates



For online delegates, or those who wish to rewatch or watch any concurrent sessions they missed, all sessions have been archived and are available for on-demand viewing until December 31, 2024. Delegates can find all sessions available through the 26th National Conference App.

The maximum CPD available is 22.25 hours for all 18 sessions.

Please note that accreditation for substantive CPD is currently pending with regulating bodies where applications are required, and CPD/CE certificates are scheduled to be sent to delegates in mid-August.

[Click here for more CPD information.](#)

*Note: Participation at the STEP Canada National Conference in-person or online is designed to meet your ongoing STEP CPD requirements. For more information, see below.*

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## 2024 STEP CPD Audit

The 2024 Continuing Professional Development (CPD) Audit Review is due to begin on **August 27, 2024**. This is a friendly reminder to ensure that your CPD records for April 1, 2023 - March 31, 2024 are up-to-date. It is recommended that members maintain a record of their CPD activities and reflective practice throughout the year to ensure that, should you be chosen at random to submit your CPD records for review, you can easily comply with the audit requests.

Members who are retired, on maternity or long-term leave, should apply for Retired or Restricted Membership to ensure their membership records are up-to-date. Once approved, this will avoid you being selected for the audit as you will be entitled to a CPD exemption.

STEP will audit 3% of eligible members (including Affiliates, Associates, and Full Members). Members selected for audit at random are notified via email and will be given two months to submit their CPD records for review.

If you have questions or concerns please contact the CPD Team at [cpd@step.org](mailto:cpd@step.org).

[Learn More About CPD](#)

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## Upcoming 2024-25 Program Season

Your local branch/chapter boards are hard at work planning exciting education and networking opportunities for the 2024-25 program season, beginning in September. Members can look forward to receiving news about the excellent upcoming opportunities to engage, learn, and network at their upcoming local branch events.

Please select your branch or chapter below to find our more information:

[STEP Atlantic](#)

[STEP Calgary](#)

[STEP Edmonton](#)

[STEP Montreal](#)

[STEP Okanagan](#)

[STEP Ottawa](#)

[STEP Saskatchewan](#)

[STEP Southwestern  
Ontario](#)

[STEP Toronto](#)

[STEP Vancouver](#)

[STEP Winnipeg](#)

Registration for most branches and chapters will be opening in the next couple of weeks. Members are encouraged to monitor the event calendar to see when new events are added.

[View the Event Calendar](#)

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## 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.

Have questions?

[More on Practitioner Opportunities](#)

or

[Post an Opportunity](#)

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## Education Centre

Education Program	Exam/Essay Date	Registration Deadline
CETA 1	Accessible at any time	Exams must be completed within 6 months of registering
CETA 2-4	September 4, 2024 March 3, 2025	Closed February 3, 2025
STEP Canada Diploma Program All Courses	November 4, 2024 May 26, 2025	September 1, 2024 March 1, 2025
Essay Submission	October 1, 2024	*2024 topics can be found <a href="#"><u>here</u></a>

## Updates

### **DIPLOMA PROGRAM**

Register before it's too late! Reminder that the last day to register for the November exam is on September 1, 2024.

Assignments for the Diploma program (English stream only) have been posted to your classroom. Please review the requirements and due dates.

Virtual Learning Sessions: Save the Dates!

Check your classroom for the schedule of our virtual learning sessions for the fall term which include mentorship circle sessions and an instructor tutorial. Don't miss out on these essential learning sessions to help prepare you for every step of your education journey. Register today via the links on your classroom.

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## Connect With Us on LinkedIn

Check out one of our recent LinkedIn posts:



*Grade Release Day!*

*As of today, June 27, all students enrolled in the STEP Canada Diploma Program in Trusts and Estates can login to their MY STEP account to view their grades under the "My Courses & Marks" section.*

*Congratulations to all students that are moving on to the next course, and those that are now eligible to apply for the TEP designation!*

*Click here to sign in -> [https://step.ca/sign\\_in](https://step.ca/sign_in)*

*Registration is open for students to book their next course, and will close on September 1, 2024 for the November 4, 2024 exam date.*

*Are you interested in finding out more about our Diploma Program? Click here -> <https://step.ca/diploma>*

*#STEP #STEPCanada #STEPCanadaDiplomaProgram #TrustsandEstates #Education #Membership*

For 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.

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

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

[Follow STEP Canada's LinkedIn Page](#)

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**STEP Canada staff** work remotely and members are encouraged to communicate with us using email. Not sure who to write to? Send any inquiry to [memberservices@step.ca](mailto: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.

## Reminders

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## Quick Links

[STEP Canada Website](#)

[STEP Member Directory](#)