



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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#### CONTENTS:

- STEP Worldwide Chair
- 2021 Q1 & Q2 Branch Bundles
- Fall 2020 Speakers' Series
- New Resources for Members
- STEP Council Briefing
- Practitioner Opportunities
- Education Centre
- Branch & Chapter Event Centre
- Happy Holidays
- Reminders
- Contact Us

**Scroll down to learn about your branches/chapters upcoming TEP Talks!**

## STEP Worldwide Chair



STEP Canada is thrilled to congratulate Nancy Golding, QC, TEP, on her new appointment as STEP Worldwide Chair.

In her role as Chair, Nancy will lead STEP's Board of Directors, responsible for the high-level strategic direction of the Society. Board members have legal authority and responsibility for the organisation and are elected by members of STEP's Worldwide Council. Nancy will take over from Simon Morgan, TEP, on January 1, 2021.

Please join us in congratulating and wishing all the best to Nancy in this new role.

To read STEP's media release, please [click here](#).

## 2021 Q1 & Q2 Branch/Chapter Bundles

STEP Canada continues to find ways to provide its dedicated members and delegates with continuing education opportunities in our rapidly changing environment. For Q1 and Q2 of 2021, STEP Canada will be transforming its regular branch and chapter in-person seminar programming into an online delivery option.

Each of STEP Canada's eleven branches and chapters will offer its local delegates a "Branch/Chapter Bundle" of excellent seminars tailored to the interest of each region. The Bundle will consist of four online seminars; one each in January, February, March, and May; plus, a complimentary 5th seminar in French\*. The January and May seminars will be unique to each branch/chapter, while the February and March seminars will be national offerings.

*\*Note that the STEP Montreal Branch will be offering both English and French seminars in their Bundle.*

Details and registration will be available this week.

## 2020 Speakers' Series

The Fall 2020 Speakers' Series has reached the end of its original broadcasts. Thank you for joining us on this new adventure, transitioning our National Conference into a virtual and interactive experience.

The Speakers' Series brought together over 800 delegates from across 7 different countries, to enjoy technical and exciting presentations from dedicated speakers. This was our largest event ever.

Thank you to our speakers, moderators, volunteers, the 2020 National Conference/ Fall Speakers' Series Program Committee, and you - our dedicated members and delegates - for making this year a success.

Don't forget - all 22 sessions will remain on the app for you to use as a resource well into the future. If you haven't registered, you still can!

[Details and Registration](#)

## New Resources for STEP Members

### **STEP Canada's Finding Financial Security in Difficult Times - Freezing & Refreezing Guide**

*STEP Canada Tax Technical Committee*

STEP Canada is pleased to deliver to its valued members the STEP Canada Guide to Finding Financial Security in Difficult Times - Freezing & Refreezing. The guide is effective as of October 15, 2020.

### **STEP Canada's TOSI Guide - 2.2nd Edition**

*STEP Canada Tax Technical Committee*

The updated consolidated edition of the STEP Canada Guide to the Tax on Split Income (TOSI) Rules incorporates two recent CRA TOSI technical interpretations dated January 10, 2020 and April 8, 2020 and is effective as of October 1, 2020.

### **STEP Canada - Canada Revenue Agency Round Table Questions & Answers**

*STEP Canada Tax Technical Committee & STEP Canada National Conference/ Fall 2020 Speakers Series Committee*

The final 2020 STEP Canada - Canada Revenue Agency Round Table Questions & Answers are now available to STEP Canada members and Speakers' Series attendees.

**STEP Canada members can access all resources above in their My STEP portal under the resources box after logging on to [step.ca](http://step.ca).**

## STEP Worldwide Council Briefing

STEP members are invited to read the key takeaways from a recent STEP Council meeting, on September 29, 2020. To read the briefing, follow the link below.

[STEP Council Meeting: Key Takeaways](#)

## 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.

Are you seeking a new professional venture? Here are our current postings:

[Senior Associate - Wellington-Altus Private Wealth, Calgary](#)

[Senior Wealth Advisor - Wellington-Altus Private Wealth, Calgary](#)

[VP, Wealth Planning, Estate & Trust Specialist - Gluskin Sheff & Associates Inc., Toronto](#)

[Estate and Succession Specialist - ATB Financial, Calgary](#)

[Senior Trust Officer - Scotiabank, London](#)

Have questions?

[More on Practitioner Opportunities](#)  
[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 (English & French)	March 1, 2021 June 1, 2021	February 1, 2021 May 1, 2021
STEP Diploma Program (English & French)	May 31, 2021 November 2, 2021	April 30, 2021 October 2, 2021
Essay Submission	May 1, 2021* October 1, 2021	-

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

### Notice from the Education Team

All marks for the diploma exams that took place on November 2, 2020 were posted to the "My Courses & Marks" section of the MY STEP Portal at [www.step.ca](http://www.step.ca). Registration into the next course is available through your MY STEP Portal under "Assessment by Exam Enrollment". A reminder for students that have completed their last exam in the diploma program: In order to obtain your TEP designation, you must complete the "Upgrade Application" form that is inside of your course website (WETA/TEPL). All program and course inquiries should be directed to our Education team at [education@step.ca](mailto:education@step.ca).

**A reminder to our students that as a benefit of your membership you have access to the STEP Canada Mentorship Program to assist you with your course. To request a mentor from your local branch send an email to [education@step.ca](mailto:education@step.ca).**

## Branch & Chapter Event Centre

Registration is open for our TEP Talks! Register early to save your spot.

*\*Capacity reached; waitlist available*

Wed Dec 9	<b>STEP Winnipeg</b> TEP Talk Zoom	Thurs Dec 10	<b>STEP Edmonton</b> TEP Talk Zoom
Fri Dec 11	<b>STEP Ottawa</b> TEP Talk Zoom	Mon Dec 14	<b>STEP Okanagan</b> TEP Talk Zoom
Wed Dec 16	<b>STEP Atlantic</b> TEP Talk Zoom	Wed Dec 16	<b>*STEP Toronto</b> TEP Talk Zoom

## Happy Holidays from STEP Canada!

The STEP Canada team would like to wish all of our dedicated members, volunteers, and supporters a very happy holiday season. Although this year will look a lot different for everyone, we hope that you are able to take time to relax and share joy with loved ones.

Please note that the STEP Canada office will be closed as of 1:00 pm on Thursday, December 24th and will reopen on Monday, January 4th. Questions during this time can be emailed to [memberservices@step.ca](mailto:memberservices@step.ca) as we will be checking our mailbox periodically.

Warm wishes from Michael, Janis, Amanda, Jenifer, Maria, Asger, Julie and Lucie!



## 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](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.

[RETURN TO TOP](#)

[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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