

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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2021 STEP Founder's Awards

STEP Canada is delighted to congratulate the Canadian recipients of the STEP Founder's Awards for 2021, Kathleen Cunningham, TEP, and Brian Cohen, TEP.

The Founder's Awards for Outstanding Achievement commemorate George Tasker, the founder of STEP, and are for those volunteers who have made 'an exceptional and outstanding contribution to the Society above and beyond that normally expected of a member through office in their branch or elsewhere in the voluntary life of the Society'.

Please join us in congratulating Kathleen and Brian on this well-deserved honour!



[Click here for more information on this year's recipients.](#)

Coming Up in the 2021-22 Branch/Chapter Bundles

Succession Law and the Indigenous Peoples of Canada

January 19, 2022
12:00 pm - 2:00 pm ET

The Indigenous Peoples of Canada have a unique relationship with Canada and its provinces, which can regulate the wills and estates of their members. This session will discuss:

- Indigenous Peoples with jurisdiction over wills and estates of members ordinarily resident on their lands, by virtue of self-government agreements;
- Indigenous Peoples land codes and registry, and its impact on succession;
- Taxation on death of on-reserve versus off-reserve interests;
- Administration of estates under The Indian Act;
- Provincial or federal legislation relating to protection of the cultural property or other interests of Indigenous Peoples:
- The provisions of Wills, Estates, and Succession Act (BC) relating to Nisga'a Final Agreement and First Nations Final Agreements; and
- The provisions of the Cultural Property Export and Import Act, with respect to objects made by the Indigenous Peoples of Canada.

MODERATOR



Paul Taylor, TEP
Borden Ladner Gervais LLP

SPEAKERS



Nadir André
Borden Ladner Gervais LLP



Isabelle Larocque
First Nations Bank of Canada



Nicole Watson, TEP
KPMG LLP

[Details and Registration](#)

STEP Worldwide Chair

STEP Canada congratulates **Nancy Golding, QC, TEP** of STEP Calgary on her re-election as the Chair of STEP Worldwide Board for 2022. Nancy's continued dedication and leadership will help guide the strategic direction and continued growth of STEP around the globe.

With nearly four decades of experience, Nancy has established herself as a leader in her field, representing individual and corporate clients on a wide variety of issues pertaining to estate and trusts.

Commenting upon her re-election Nancy said: 'I am honoured to have this opportunity to contribute to the next phase of STEP's evolution and growth.'

Please join us in sending well-wishes and much deserved congratulations to Nancy for this success.

[More information](#)

Financial Planning Week Special Report

On Friday, November 26th, STEP Canada was featured in The Globe and Mail with an article and ad in the Financial Planning Week Special Report. The article featured an interview with two experienced TEP members, Rhonda Johnson (Edmonton) and Andrée Godbout (Atlantic), as they discussed the specialized guidance trust and estate practitioners can provide for complex-estate plans, a very important topic for all families.

We are excited to share a copy of this feature.

[Click here to view](#)

[Click here for an online version of the article](#)

CE/CPD Credits for Past Events

The Member Services team sends supplementary CE/CPD credit certificates monthly for the 2021 Q1 & Q2 Branch Bundle and the 23rd National Conference.

If you have not yet viewed the sessions or completed the quizzes for either event, the archived broadcasts remain available on the app for your viewing. Please contact **Member Services** if you have questions about your CE/CPD credit certificates.

Don't forget - registration is still open for both events if you require CE/CPD credits!

[Details and registration for the 2021-22 Branch/Chapter Bundle](#)

[Details and registration for the 2021 Q1 & Q2 Branch/Chapter Bundle](#)

[Details and registration for the 23rd National Conference](#)

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.

Trust Officer - CIBC (Alberta or British Columbia)

Senior Trust Officer - CIBC (Alberta or British Columbia)

Associate Director, Gift and Estate Planning - University of British Columbia (Vancouver, BC)

Assistant Manager, Estate Planning - Solus Trust Company Limited (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	March 1, 2022 June 1, 2022	February 1, 2022 May 1, 2022
STEP Canada Diploma Program	May 30, 2022 November 7, 2022	April 30, 2022 October 7, 2022
Essay Submission	May 1, 2022 October 1, 2022	*2022 topics can be found here

Upcoming Branch & Chapter Events

**Save the date - registration coming soon*

Wed Jan 5	STEP Winnipeg TEP Talk 12:00 noon - 1:00 pm CT Zoom	Wed Jan 5	STEP Southwestern Ontario TEP Talk 12:00 noon - 1:00 pm ET Zoom
Mon Jan 10	STEP Toronto STEPping out to Lunch 12:00 noon - 1:00 pm ET Zoom	Thurs Jan 20	STEP Atlantic *Members Networking Reception 5:00 pm - 7:00 pm AT In-Person

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

Happy Holidays from STEP Canada

The STEP Canada team would like to wish all our dedicated members, volunteers, and supporters a very happy holiday season. 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 Friday, December 24th and will reopen on Tuesday, January 4th. Questions during this time can be emailed to memberservices@step.ca as we will be checking our mailbox periodically.

Warm wishes from Michael, Janis, Amanda, Jenifer, Maria, Asger, Julie, Megan, 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 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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