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*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 STEP Founder's Awards

STEP Canada is delighted to congratulate the Canadian recipients of the STEP Founder's Awards for 2022, Aileen Battye TEP, Elaine Blades TEP, and Hélène Marquis 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 Aileen, Elaine, and Hélène on this well-deserved honour!

Click here for more information on this year's recipients

We Want Your Questions

An invitation to all members to submit questions to the 2023 CRA / STEP Canada Round Table Committee for consideration

The 2023 CRA / STEP Canada Round Table Committee invites you to submit questions to be considered for the 2023 Round Table presentation that will take place during the 25th National Conference in June 2023. Each year the much-anticipated CRA / STEP Canada Round Table proves to be a highlight of the conference; and an invaluable resource to estate planning practitioners across the country.

Your contribution to the "question bank" will be appreciated by the committee; and if selected, by thousands of practitioners.

Questions must be received by **FRIDAY, DECEMBER 30TH, 2022** for consideration. Please send your questions to:

steproundtablequestions@step.ca

Upcoming Event: Two-Day Online Course

Have you registered yet for our first ever two-day online course? Don't miss your chance – there are still spots available in most cohorts! Join us from the comfort of your home or office for "Canada/US Cross-Border Estate Planning", which offers a mix of recorded and live online interactive learning and a total of 10 hours of CPD!

Our instructors, **Leslie Kellogg**, **Carol Fitsimmons**, **Britta McKenna**, and **Paul Gibney** have designed an original course for practitioners in law, accounting, financial planning, or insurance whose clients face cross-border estate-planning and US taxation issues. Numerous practical examples, case studies, and strategies will be provided.

Testimonial from the National Programs Committee:
"Having had a sneak preview of the materials for the upcoming 2023 Canada/US Cross-Border Estate Planning Two-Day Online Course, this is by far the most in-depth program on cross-border planning for Canadians with US connections. The program takes a building-block approach by starting with the basics and then layering on fact patterns. The fact patterns selected for review by the Faculty are those that Canadian practitioners operating in the world of high net worth clients or owner-managers come across on a day-to-day basis. I have no doubt that by the end of the program, participants will have the tools they need to not only issue-spot but provide value-added observations to help guide their clients in managing the complexity of cross-border planning. I can't wait to attend the actual sessions and listen to what the esteemed faculty has to teach me."

Course Focuses:
Overview of US Income, Gift, and Estate Taxes
Cross-Border Estate-Planning Design and Drafting
Trusts, Trusts, and More Trusts
Everyone's Worst Nightmare: The US Anti-Deferral Rules
In-Depth Cross-Border Pre-Mortem and Post-Mortem Planning Involving Corporations and Trusts
Comings & Goings
Canadians Who Winter in the United States

Registration now open!

Members $425 | Non-Members $575

Details and Registration

Coming Up: 2022-23 Branch/Chapter Bundles

No matter how you attend, in-person or online, the six seminars included in the 2022-23 hybrid Branch/Chapter Bundle offer in-depth technical content, excellent value, and continuing education (CPD) opportunities.

Up Next:
Planning for Family Members with Disabilities
National Seminar - Online Viewing Only
January 19, 2023 | 12:00pm - 2:00pm ET

Our panel of experts will present a comprehensive refresher on the variety of strategies to consider when your clients need planning for a disabled family member, including updates on one of the most commonly used tools, Henson Trusts. Matters of mental illness, addiction, dementia, and the Disability Tax Credit and RDSPs will be contemplated, including addressing challenges with intermittent capacity/incapacity, gradual decline, respect for autonomy, gradual reduction in independence and increase in vulnerability.

We will also revisit traditional clauses typically used in our wills and substitute decision making documents to address these issues, and whether we might update them to provide more guidance and flexibility to our fiduciaries and to better suit the nuanced situations. The presentation will also include an examination of the Bill C-22 proposals to enact the Canada Disability Benefit Act to create a new Canada disability benefit for working-age persons with disabilities and its resulting information disclosure power and potential engagement of section 8 of the Charter. Lastly, we will discuss the various Court options available if no planning is done, or if there are issues regarding the planning or choice of substitute decision makers, such as trustee and guardianship litigation.

Not yet registered? Join the 800+ members and non-members who will benefit from this program's CPD and networking opportunities by registering today.

Details and Registration

Save the Date: 25th National Conference

Monday & Tuesday, June 19 & 20, 2023 - Toronto

Join us in-person for a lineup of outstanding sessions featuring over 50 respected experts who will deliver the highly regarded technical content this conference is known for! Not only is this the first in-person conference since June 2019, but it also marks STEP Canada’s 25th anniversary - Please join us in celebrating this very special milestone.

In-person conference proceedings will be recorded and made available post-conference in an e-archived on-demand format to all in-person and e-archived on-demand registrants.

Take in all 17 sessions and receive up to 16.75 hours of CPD!

Details and registration coming soon

Final Reminder: E-Archived On-Demand App Access Expiring Soon

Members are reminded that access to all apps including the 2020 Speakers' Series, 2021 Q1 & Q2 Branch/Chapter Bundles, 2021 National Conference, 2021-22 Branch/Chapter Bundles, and the 2022 National Conference will expire on December 31, 2022.

If you still require CPD/CE credits, would like to rewatch the seminars and/or download the seminar materials, please login to the applicable app before December 31st. In order to receive CPD/CE credits, delegates must complete the seminar quiz(zes), and the certificates will be issued in January 2023. Please note that while STEP Canada will still issue CPD certificates for the hour(s) completed, some of the accreditations with governing bodies may be expired.

The presentation materials from these events are available to members in the Searchable Resource Tool (SRT).

If you have questions or need assistance accessing an app, 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.

Estate and Trust Specialist - MD Financial Management (Montreal, QC)

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, 2023 June 1, 2023	February 1, 2023 May 1, 2023
STEP Canada Diploma Program	May 29, 2023 November 6, 2023	March 29, 2023 September 7, 2023
Essay Submission	May 1, 2023 October 1, 2023	New topics for 2023 will be released in January 2023.

Updates

Diploma Program
The grades for the November 7th exams are posted to your MY STEP account under "My Courses & Marks". Registration is open for you to book into your next course. Reminder that registration closes on March 29, 2023 for the May 29, 2023 exam date.

Congratulations to our students that completed the STEP Canada Diploma program. A reminder to send your upgrade applications to education@step.ca by January 9, 2023, in order to be considered for the February 2023 approval meeting.

Connect With Us on LinkedIn

A recent 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 on December 1st, 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

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**.

Upcoming Branch & Chapter Events

Click to view the entire upcoming schedule for the 2022-23 Branch/Chapter Bundles.

NEW!
Search all STEP Events including branch/chapter seminars and networking events, national conferences and webcasts, education and important dates using the new STEP Canada Event Calendar.

View the calendar here

Happy Holidays from STEP Canada

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

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STEP Member Directory

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