



E-Newsletter Vol. 11 | Issue 12 | December 12, 2023

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!



**Paul W. Taylor LLB, TEP**  
BLG LLP



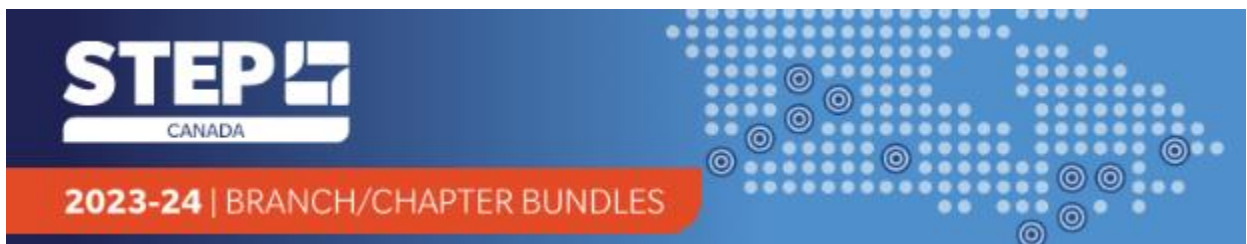
**Corina S. Weigl LLB, TEP**  
FASKEN LLP

**Congratulations to Paul Taylor, LLB, TEP of STEP Ottawa and Corina Weigl, LLB, TEP, of STEP Toronto on their well-deserved recognition as 2023 Founder's Awards recipients!**

The Founder's Award for Outstanding Achievement is awarded to exceptional volunteers who have made an extraordinary and outstanding long-term contribution to the Society, above and beyond what is normally expected of a volunteer.

Please join us in triumphant applause for Paul and Corina and their exceptional achievement.

[View All 2023 Recipients](#)



**Don't Miss Out: Mark Your Calendars for the Upcoming National Bundle Seminar!**

January 17th, 2024  
12:00pm - 2:00pm ET - ONLINE VIEWING ONLY

**Better Breadcrumbs: Assisting Clients in Preparing A Clear, All-Inclusive and Tax Efficient Road Map for Their Fiduciaries and Families**



**Lindsay MacPhie**  
CIBC Private Wealth



**Sara Adami-Johnson**  
RBC Wealth  
Management



**Kenneth Keung**  
Moody's Private Client



**Tom McCullough**  
Northwood Family Office

As Hansel and Gretel discovered, breadcrumbs may not be the best aids to navigation. In estate planning, the fiduciary is often left with poor 'breadcrumbs' to follow to determine and manage the clients' assets and wishes. Assets get missed, costs mount, and family tensions rise- exactly what an estate plan is aiming to avoid. How can we assist our clients prepare a better estate road map with sufficient, current details to give everyone more peace of mind? Our panel will discuss practical issues and solutions, including:

- documenting and tracking (and consolidating?) assets, including unusual ones, such as individually owned stocks, old life insurance policies and digital assets
- ensuring client's privacy and security while planning for access by others
- information sharing with fiduciaries now
- addressing tax issues now
- how will those shareholder agreements work?
- gradual transition and preserving dignity during gradual decline
- test running the plan now
- lessons from the past

This seminar is available exclusively to Branch/Chapter Bundle delegates.

[Details & Registration](#)

## A Gift is Coming Your Way



For the last 20 years, STEP Canada and the Canada Revenue Agency (CRA) have collaborated to deliver the annual roundtable session at STEP's national conference each June, a highlight every year since it was added to the program in 2004. In 2018, to commemorate STEP Canada's 20th anniversary, STEP members Michael Cadesky and Kim Moody offered to compile a book of highlights and still-relevant questions and answers from past roundtables. Now, in 2023, as STEP Canada is celebrating its 25th anniversary, we are fortunate that Michael and Kim were willing to add five more years of content to this remarkable resource, and for the first time adding their skilled commentary on the CRA's responses.

STEP Canada is self-publishing this edition, and we are proud to be able to share it with STEP's 3,450+ members to commemorate this milestone anniversary. STEP members can expect this book to be delivered to their preferred address on file the week of December 18th.

We owe a tremendous debt of gratitude to Michael, Kim, past moderators, CRA representatives, all those who worked behind the scenes, and those who have contributed over the years both in submitting questions and providing answers. Thank you.

## Family Enterprise Advisor

Only the Family Enterprise Advisor (FEA) Program prepares you to be fluent in the complexities and nuances of serving business families.

The **FEA Designation** is the global benchmark in family business advising. Designed for professionals with significant technical knowledge, taking the FEA Program will enhance your ability to serve your family enterprise clients. In the crowded field of family enterprise advising, there is one sure way to stand out: the FEA Designation.

In 2024, we will be offering you three opportunities to become "fluent in family enterprise". The FEA Program will now feature a blend of virtual and in-person delivery in several exciting locations across Canada! Connection and convenience in one executive education experience. Register for the 2023 FEA Program today! **STEP Members receive a 10% discount.**



"For almost 20 years, I have been practicing tax and estate planning law and consider myself to be a trusted advisor to my clients. My clients are predominantly owner managed businesses, many of which are enterprising families. It wasn't until taking the FEA Program in 2021 that I realized that being the trusted advisor to a family enterprise means much more than just answering technical legal questions. As an FEA, I can now speak to both the technical aspects of estate planning and ask probing questions that make clients think deeper about the decisions they are making and the lasting impact they will have on the family as a system."

**Elise Pulver, LLB, TEP, FEA**  
Principal, Wealth Planning Lead  
TD Wealth Family Office

[Learn More](#)

## Save the Date: 26th Annual National Conference

Mark the date in your calendar!

Planning is underway for STEP Canada's 26th Annual National Conference, and we hope to see you in June 2024 taking advantage of great technical sessions, networking, and much more.

**Monday, June 3 & Tuesday, June 4, 2024**  
in Toronto at the Sheraton Centre Toronto Hotel

**Monday, June 10, 2024**  
On-Demand Replays

Watch [step.ca](http://step.ca) for more information to be released in the next few weeks.



## 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](#)

## Education Centre

Education Program	Exam/Essay Date	Registration Deadline
CETA 1	Accessible at anytime	Exams must be completed within 6 months of registering
CETA 2-4	March 4, 2024	February 4, 2024
STEP Canada Diploma Program	May 27, 2024	March 1, 2024
Essay Submission	May 1, 2024	

## Updates

### Diploma Program

Grades are now available for those who wrote the November 6th exams and are posted in the “My Courses & Marks” section of your MY STEP account. If applicable, registration is now open to book into your next course, closing on March 1st, 2024, for the May 27th, 2024 exam date.

Congratulations to students that have now completed the STEP Canada Diploma program. Please remember to send your completed upgrade application to [education@step.ca](mailto:education@step.ca) by January 10th, 2024, to be considered for the February 2024 panel review.

### **New for 2024**

We continuously strive to enhance the quality of our courses, ensuring you receive the best education possible. New for 2024, the diploma courses will have assignments that are part of the final course mark, and some courses will include external textbooks in addition to the STEP material.

Please be advised that there will be a modest fee increase of \$100 for each diploma course starting January 15th, 2024. This adjustment is necessary to cover the higher costs incurred in delivering our courses, and the introduction of an inclusive fee structure.

Course fees are inclusive of reading materials, including external texts where applicable, practice resources, online examination, and live-virtual programming. This means that in most cases you will have access to all necessary materials without the need for additional purchases, contributing to a more seamless and comprehensive educational journey.

We understand the financial commitment that continuing education requires, and we want to assure you that this decision was not made lightly. Our primary goal is to continue providing you with the highest quality education and support. Inquiries regarding the change in fees should be directed to [atattoli@step.ca](mailto:atattoli@step.ca).

### **Mentorship Circles**

As part of our commitment to enhance the delivery of our education, we are excited to implement mentorship circles into the diploma program. If you have your TEP and can spare at least 2 hours PER YEAR, your time can have a big impact for your fellow members working towards their designation. Please reach out to [education@step.ca](mailto:education@step.ca) for more information.

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## Connect With Us on LinkedIn

Check out our latest LinkedIn post:



*STEP Canada is proud to announce the latest recipients of the prestigious Trust and Estate Practitioner (TEP) designation. The above members were granted the designation in November and December, 2023.*

*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](#)*

For most 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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## Upcoming Branch & Chapter Events

### STEP Ottawa

*Annual Holiday Party*  
December 14, 2023  
5:00pm - 7:00pm ET  
CIBC Wood Gundy, Elgin  
Street, Ottawa

### STEP Toronto

*Student Social Event*  
December 14, 2023  
6:00pm - 9:00pm ET  
The Pint House, Front  
Street, Toronto

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# HAPPY HOLIDAYS

Please note the STEP Canada office will be closed  
from December 25th, 2023 through January 1st,  
2024, reopening on January 2nd, 2024.

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## 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.

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## Quick Links

[STEP Canada Website](#)

[STEP Member Directory](#)

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