



E-Newsletter Vol. 12 | Issue 2 | February 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!

19th Annual
STEP PRIVATE CLIENT Awards
ENTRIES NOW OPEN!
Entry deadline: April 12, 2024
Showcase your excellence to your peers and clients
ENTER NOW

Entries for the 19th Annual STEP Private Client Awards are now open!

Seen as the hallmark of quality within the private client industry, the Awards are open to both STEP members and non-members and entries are encouraged from all over the world. Canadians are encouraged to apply as these prestigious Awards recognize and celebrate excellence among our private client solicitors, lawyers, accountants, barristers, bankers, trust manager and financial advisors.

[Details](#)

Coming Soon: 2024-25 Membership Renewals

At the beginning of March 2024, all STEP Canada members will be mailed their annual renewal package containing details for this year's renewal period, at the same time the payment portal in your MY STEP account will open for processing membership renewal dues.

To ensure your membership renewal package arrives on time, please login to your MY STEP account to verify your contact information is correct or update it if necessary.

The deadline to renew your STEP membership will be April 1, 2024. Renewing your STEP Canada membership will allow your continued use of the TEP designation (if applicable) and grant multiple membership benefits such as discounts on programs/seminars, access to member-only publications and resources, representation from STEP, access to the Searchable Resource Tool (SRT) and much more.

Watch your inbox in early March for details on how to renew.

[Access Your MY STEP Account](#)

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

February 22, 2024

12:00pm - 2:00pm ET - ONLINE VIEWING ONLY

**What to Do When Things Go Off the Rails -
A Cross-Provincial Examination of Capacity Disputes**

MODERATOR & SPEAKERS



Kimberly Whaley
WEL Partners



Kathleen Cunningham
Consultant



Marilyn Piccini Roy
Robinson Sheppard Shapiro
S.E.N.C.R.L./LLP



M. Jasmine Sweatman
Sweatman Law
Professional Corporation

Throughout Canada, there is inconsistent treatment of capable persons and persons whose capacity is at issue. Often, the presumption of capacity is overlooked by courts. This is even seen in cases where a person had the capacity to retain and instruct counsel but has lost that capacity down the line throughout the litigation and proceedings. So, what happens when 'things go off of the rails' in capacity disputes? How do we protect the rights of the incapable person?

This seminar is available exclusively as part of the 2023-24 Branch/Chapter Bundles.

[Details & Registration](#)

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 for more information to be released shortly.



Save the Date: STEP Canada-USA Cross-Border Conference



Do you have a specialized interest in Canada-USA Cross-Border topics? Then save the date in your calendar for the inaugural STEP Canada-USA Joint Cross-Border Conference!

This in-person only conference will showcase numerous opportunities for cross-border networking, and will take place in **Chicago** from **Sunday, October 6th** through **Tuesday, October 8th, 2024**. There will be limited capacity for this event.

Watch step.ca for more information to be released in the next few weeks.

The Oxford Handbook of Comparative Trust Laws: The Conference

Sponsored by STEP Canada

Friday, April 5 - Sunday, April 7, 2024
Vancouver, BC

The Conference will bring together most of the world's leading trust law academics to discuss key topics in the current law of trusts. It is one stage in the process of producing the forthcoming Oxford Handbook of Comparative Trust Laws, edited by Richard Nolan (York Law School, UK), Lusina Ho (Hong Kong University), Mark Bennett (Victoria University of Wellington, New Zealand) and Adam Hofri-Winogradow (Allard Law, UBC), and under contract with Oxford University Press. Each presentation will focus on a doctrinal, practical or theoretical topic, as dealt with under the laws of more than 30 countries around the world.



[Details & Registration](#)

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 2024 FEA Program today! **STEP Members receive a 10% discount.**

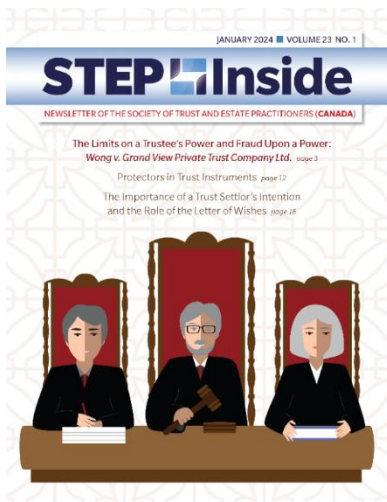


"For more than 20 years, I have been practicing tax and estate planning law and consider myself to be a trusted advisor to my clients. My clients are predominantly owner managed businesses, many of which are enterprising families. It wasn't until taking the FEA Program in 2021 that I realized that being 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
TD Wealth Family Office

[Learn More](#)

STEP Inside - January 2024



Jump into the newly released January 2024 edition of STEP Inside!

Members can find their digital copy linked below or in the Resources section of their MY STEP account.

STEP Canada would like to express heartfelt appreciation to members of the editorial board, reviewers, and authors for sharing their valuable expertise with STEP members across the country.

As always, the editorial committee welcomes article proposals from all members for future editions at news@step.ca.

Don't forget! As a benefit of membership, all members are entitled to receive a hard copy of this valuable resource in addition to the electronic copy. Review and update your subscription preferences in your MY STEP account.

[Access the January STEP Inside](#)

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 & Trust Litigation Lawyer - WEL Partners \(Toronto, ON\)](#)

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	Registration Closed
	June 10, 2024	May 10, 2024
STEP Canada Diploma Program	May 27, 2024	March 1, 2024
	November 4, 2024	September 1, 2024
Essay Submission	May 1, 2024	

Update

Diploma Program

Mentorship Circle sessions for the spring term will take place in April and May. The applicable dates and times, registration links, and the case studies and questions that will be discussed at the sessions can be found on your course website. This is a great opportunity to enhance your learning experience, make valuable connections, and benefit from the diversity of professional experience of your peers and senior practitioners (TEPs).

Mentorship circle sessions are a valuable exam preparation opportunity.

Any questions can be sent to education@step.ca.

Connect With Us on LinkedIn

Check out our latest LinkedIn post:

Congratulations to our new TEPs!



Diploma Programs

Adam Burt, TEP, STEP Ottawa
Adam Carris, TEP, STEP Vancouver
Alessandro Cotugno, TEP, STEP Montreal
Alexander Hamilton, TEP, STEP Vancouver
Ali Chang, TEP, STEP Vancouver
Andrew Winston Tuttle, TEP, STEP Edmonton
Brian Kennedy, TEP, STEP Toronto
Bryce Milson, TEP, STEP Atlantic Provinces
Caroline Yu Ping Liu, TEP, STEP Toronto
Christina Hassan, TEP, STEP Calgary
Colin Marshall, TEP, STEP Atlantic Provinces
Colin Reid, TEP, STEP Toronto
Courtney Yaremchuk, TEP, STEP Saskatchewan
Craig Merriam, TEP, STEP Atlantic Provinces
Daley Madu, TEP, STEP Calgary
Dario Bon, TEP, STEP Vancouver
David Dryburgh, TEP, STEP Southwestern Ontario
Deepika Jain, TEP, STEP Toronto
Diane Enns, TEP, STEP Saskatchewan
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Graham McGillivray, TEP, STEP Atlantic Provinces
Guillaume Lanthier, TEP, STEP Montreal
Gurman Arora, TEP, STEP Calgary
Gurmehi Kasbia, TEP, STEP Vancouver
Heng (Mavis) Luo, TEP, STEP Calgary
Hillary Linden, TEP, STEP Vancouver
Jason Claydon, TEP, STEP Winnipeg
Joée Ducharme, TEP, STEP Montreal
John Baldassarra, TEP, STEP Toronto
Juan Reina, TEP, STEP Toronto
Julie Kwan, TEP, STEP Toronto
Justine Lam, TEP, STEP Vancouver
Kha Dang, TEP, STEP Toronto
Kristopher Kibler, TEP, STEP Calgary
Laura Shylko, TEP, STEP Edmonton
Leon Kwan, TEP, STEP Vancouver
Lily Liu, TEP, STEP Vancouver
Lisa Raponi, TEP, STEP Toronto
Madeleine Coats, TEP, STEP Atlantic Provinces
Marie-Helene Roussel, TEP, STEP Ottawa
Martin-Alexandre Campbell, TEP, STEP Montreal
Matthew Moriarty, TEP, STEP Ottawa
Matthew Sharp, TEP, STEP Calgary
Max Shilleto, TEP, STEP Vancouver
Michael Harrington, TEP, STEP Toronto
Michael Baker, TEP, STEP Calgary
Michel Abou-Mechrek, TEP, STEP Saskatchewan
Nithila Murugadas, TEP, STEP Toronto
Olivier Blais-Ampleman, TEP, STEP Montreal
Patrick Fontaine, TEP, STEP Ottawa
Reea Galeano, TEP, STEP Toronto
Sareh Lua Ebrahimi, TEP, STEP Toronto
Shanela Baig Von Dyck, TEP, STEP Ottawa
Simran Rahi, TEP, STEP Toronto
Tammy Buss, TEP, STEP Southwestern Ontario
Taylor Sergeant, TEP, STEP Ottawa
Thomas Cook, TEP, STEP Atlantic Provinces
Tiffany Woodfield, TEP, STEP Okanagan
Tiziana Cirigliano, TEP, STEP Montreal
Virginia (Yang Zi) Zhao, TEP, STEP Vancouver
Wen Xiao (Michelle) Kang, TEP, STEP Toronto
Wendy Enns, TEP, STEP Vancouver
Yang (Beth) Bai, TEP, STEP Calgary
Yanli (Jane) Jiang, TEP, STEP Toronto

Expertise

Bolanle Oyelade, TEP, STEP Calgary
Brian Gillingham, TEP, STEP Ottawa
Mark Feigenbaum, TEP, STEP Toronto
Nozomi Smith, TEP, STEP Toronto
Robert Flux, TEP, STEP Vancouver

STEP Canada is proud to announce the latest recipients of the prestigious Trust and Estate Practitioner (TEP) designation. The below members were granted the designation in February 2024.

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 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

Upcoming Branch & Chapter Events

STEP Toronto

[STEPping out to Lunch](#)
March 4, 2024
12:00pm - 1:00pm ET
Zoom

STEP Winnipeg

[TEP Talk](#)
March 6, 2024
12:00pm - 1:00pm CT
Zoom

STEP Southwestern Ontario

[TEP Talk](#)
March 7, 2024
12:00pm - 1:00pm ET
Zoom

STEP Calgary

[TEP Talk](#)
March 7, 2024
8:00am - 9:00am MT
Zoom

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

[STEP Canada Website](#)

[STEP Member Directory](#)

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