

E-Newsletter Vol. 13 | Issue 2 | February 11, 2025

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!

[STEP Canada Website](#)

[STEP Member Directory](#)

[Advising Families Canada](#)

[Practitioner Opportunities](#)



## Grow Your Connections

Registration is NOW OPEN for our 27th annual National Conference!

Join fellow STEP members, students, sponsors, exhibitors, and industry professionals at this must-attend event for trust and estate practitioners! Attended by more than 1,000 professionals from across Canada and around the world, this preeminent event will offer unparalleled opportunities for **networking**, **professional growth**, and **continuing education**.

The 2025 conference will take place on **Monday & Tuesday, June 16-17**, in-person at the Sheraton Centre Toronto Hotel. Those wishing to view the online on-demand conference will have access as of **Monday, June 23rd**.

**Save \$100 - Take advantage of our early bird fees if you register before March 1st, 2025.**

[Details & Registration](#)

## STEP Canada Full-Day Course



### Advising Executors From Death Certificate to Clearance Certificate

Tailored for tax and estate professionals, this comprehensive course offers an in-depth exploration of estate management, empowering you to provide exceptional guidance to your clients. From initial administration tasks such as organ donation and funerals to intricate issues like multi-will management and asset distribution, acquire the comprehensive knowledge necessary. Gain a deep understanding of tax filings, probate applications, and the safeguarding of assets while addressing liabilities. Elevate your ability to confidently navigate beneficiary issues, compensation, and court proceedings.

[Edmonton: Wednesday, Feb 12 \(OPEN\\*\)](#)  
[Calgary: Wednesday, Feb 19 \(OPEN\\*\)](#)  
[Saskatoon: Wednesday, Feb 26 \(OPEN\\*\)](#)

[Cambridge: Tuesday, Mar 4 \(OPEN\\*\)](#)  
[Halifax: Thursday, Mar 6 \(OPEN\\*\)](#)  
[Montreal: Thursday, May 8](#)

*\*Only a few spots remaining*

In-person capacity limits will be enforced; register now to avoid disappointment!

## Details & Registration

### Coming Soon: 2025-26 Membership Renewals

At the beginning of March 2025, all STEP Canada members will be mailed their annual renewal package containing details for this year's renewal period, at the same time the portal in your MY STEP account will open for processing membership renewal dues.

**The deadline to renew your membership for 2025-26 will be April 1, 2025.**

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. In the meantime, please login to your MY STEP account to verify your contact information is correct:

[Login to MY STEP](#)

### STEP's 20th Annual Private Client Awards



The banner features the STEP logo (ADVISING FAMILIES ACROSS GENERATIONS) and a gold star with '20th ANNIVERSARY'. The main text reads 'STEP PRIVATE CLIENT Awards ENTRIES NOW OPEN!'. Below this, it says 'Showcase your excellence to your peers and clients' and 'Entry deadline: April 11, 2025'. On the right, it states '25 categories open for entry' and includes a gold button that says 'ENTER NOW'.

The prestigious STEP Private Client Awards celebrate their 20th anniversary in 2025! Seen as the hallmark of quality within the industry, 25 unique categories will be open for entry until **April 11th, 2025**. Winners will be announced at the Awards Ceremony in London, UK on September 18, 2025.

*"Being recognised on a global scale with such a prestigious award gives us tangible proof for our commitment to excellence."*

*- Patricia Saputo, TEP, Crysalia - Montreal, QC  
Winner of Family Business Advisory Practice of the Year 2024*

[Learn More](#)

### Contribute to STEP Inside



Attention Readers!  
Are you interested in contributing to STEP Inside?

As an Author:

Each issue contains 2-3 lead articles and 7 regional "In the Headlines" pieces. The lead articles are 2500-3000 words; the regional headline pieces are 700-800. All content is subject to professional editing and technical review. Send your article proposal to [news@step.ca](mailto:news@step.ca) for editorial committee consideration.

As an Editorial Committee Member:

The committee meets 3x annually to discuss story line-ups for forthcoming issues. Committee members take turns authoring the lead editorial that ties the issue content together, performing technical content reviews, and are occasionally authors. Email [news@step.ca](mailto:news@step.ca) to express your interest in joining the editorial committee (2-3 opportunities annually).

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## Family Enterprise Advisor

### The Great Wealth Transfer is Here — Prepare for Success with the Family Enterprise Advisor (FEA) Program

Only the [FEA Program](#) equips you to navigate the unique complexities inherent in advising entrepreneurial families and families of wealth. As the global benchmark in family enterprise advising, earning the FEA designation helps you stand out in this increasingly crowded field.

The FEA Program is now offered in three annual cohorts: two with a blend of in-person and virtual learning, and one entirely virtual so you can earn the FEA designation from anywhere in the world. Register now to take advantage of early bird pricing, plus a 10% discount for STEP Members!



*"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](#)

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## 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.

[Senior Trust Officer - Scotiabank \(Vancouver, BC\).](#)

[Senior Tax Manager - S + C Partners LLP \(Mississauga, ON\).](#)

[Trust Administrator - BMO \(Toronto, ON\).](#)

[Estate Planning Lawyer - IG Wealth Management \(Any Canadian Common Law Jurisdiction\)](#)

[Director, Estate Planning - BMO Private Wealth \(Halifax, Moncton, Saint John, Fredericton, Charlottetown\).](#)

[Advisor, Business Strategies - Desjardins \(Montreal, QC\).](#)

Have questions?

[More on Practitioner Opportunities](#)

or

[Post an Opportunity](#)

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## 2024-25 Program Season

Are you looking for regionally focused networking opportunities, in-depth technical content, or ways to meet your CPD requirements? Check out what your local branch/chapter is offering for the 2024-25 program season!

Thoughtfully crafted by your volunteers and supported by generous sponsors, this year's seminar offerings will present you with numerous options to enhance your knowledge and expand your professional network.

To learn more, click the link below and select your local branch or chapter.

[STEP Atlantic](#)

[STEP Calgary](#)

[STEP Edmonton](#)

[STEP Montreal](#)

[STEP Okanagan](#)

[STEP Ottawa](#)

[STEP Saskatchewan](#)

[STEP Southwestern Ontario](#)

[STEP Toronto](#)

[STEP Vancouver](#)

[STEP Winnipeg](#)

Members can also view the Event Calendar to see all upcoming events.

[View the Event Calendar](#)

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## Education Centre

Education Program	Exam/Essay Date	Registration Deadline
CETA 1	Accessible at any time	Exams must be completed within 6 months of registering
CETA 2-4	March 3, 2025	Registration now closed
	June 2, 2025	May 2, 2025
STEP Canada Diploma Program <i>All Courses</i>	May 26, 2025	March 1, 2025
Essay Submission	May 1, 2025	<a href="#">2025 topics can be found here</a>

## Updates

### DIPLOMA PROGRAM

To help support your preparation for the upcoming May exam, STEP Canada will now be hosting **two** live-virtual tutorial sessions (English stream) and one tutorial + peer learning session (French stream). To find your specific session dates and times, along with the registration links, please check your course website.

[Login to MY STEP](#)

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## STEP Global Congress 2025

You can now book tickets for the next STEP Global Congress, which will be taking place in Rome, Italy on February 25 and 26, 2025. Congress will address the challenges and opportunities presented by the next generation of wealth holders; the fight against economic crime; and the debate over implementing a global wealth tax, offering diverse perspectives on potential impact and feasibility.

[Details & Registration](#)

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## Connect With Us on LinkedIn

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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## Searchable Resource Tool (SRT)

**Reminder:** As a benefit of STEP membership, you can easily search and access content from our library, including a collection of PDF versions of presentation decks, formal papers, additional resources, and articles from Branch/Chapter seminars, National Conferences, and Webcasts, as well as articles from STEP Inside.

Since its launch in March 2022 there have been almost 10,000 individual searches, with some of the most popular search terms being "digital assets", "cross-border", "insurance", "spousal trust", "estate freeze", and "wills".

The SRT has continued to grow with over 10 years' worth of content, including recent events such as the 2024 National Conference and the Canada-US Cross-Border Conference.

Members can access the SRT by logging into their MY STEP account.



Login to MY STEP

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## Reminders

**STEP Canada staff** work remotely and 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.

Click to [edit Email Preferences](#) or [Unsubscribe](#) from this list.

STEP Canada  
45 Sheppard Avenue East  
Suite 510  
Toronto, ON M2N 5W9 - Canada  
Telephone: 416-491-4949