



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 CRA/ STEP Canada Round Table Committee: We want your questions!



The 2021 CRA / STEP Round Table Committee invites you to submit questions to be considered for the 2021 Round Table presentation that will take place during the 23rd National Conference, June 14-15. Each year the much anticipated CRA / STEP 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, to thousands of practitioners.

Questions must be received by MONDAY, FEBRUARY 1, 2021 for consideration. Please send your questions to:

STEPRoundTableQuestions@step.ca

2021 Q1 & Q2 Branch/Chapter Bundles

STEP Canada is thrilled to announce that the 2021 Q1 & Q2 Branch/ Chapter Bundles are now open for registration and broadcasts will be beginning this week.

STEP Canada is once again providing its dedicated members and delegates with continuing education opportunities in a virtual environment. We have transformed our regular branch in-person seminar programming into an interactive online delivery option - similar to the STEP Canada Fall 2020 Speakers' Series.

The Bundle will consist of four online seminars, plus a complimentary fifth seminar. All seminars will be broadcast through the 2021 Q1 & Q2 Branch/Chapter Bundle App - with a chat room running in tandem during the original broadcast dates for you to ask questions and pose comments to the speakers in real time.

This is the only registration required for Q1 & Q2 of 2021. You will not need to register individually for any seminar, your access to all will be automatic with your purchase of a Branch/Chapter Bundle.

To view more details and to register for your local Branch/Chapter Bundle, click the link below!

[Details and Registration](#)

2020 Speakers' Series - CE/CPD Credits

All CE/CPD certificates have now been emailed to delegates that viewed the session(s) and successfully passed the required quiz as of December 7, 2020. If you did not receive your CE/CPD certificate, or you believe your certificate is missing credits for session(s) that you have attended, please read the information below carefully before contacting Member Services.

Reminder: In order to receive CE/CPD credits, delegates are required to complete the quiz after viewing the original/archived broadcast session(s). Once you have submitted your quiz results, you will receive a confirmation email notifying you of the completion of the quiz along with your quiz results and this will be proof of your attendance. This quiz is located at the bottom of the session broadcast page, underneath the video. If you did not receive a confirmation email, we do not have record that you attended the session and would not have issued a certificate.

For delegates that have not completed the series or did not pass the required quiz, the archived broadcasts will remain on the app for your viewing and all quizzes will remain active. STEP Canada will be sending out supplementary CE/CPD certificates on a monthly basis moving forward.

[Details and Registration](#)

STEP's Business Families Special Interest Group (SIG)

The Ten Domains of Family Wealth STEP Web Event

This webinar will be a conversation with Dr. James (Jim) Grubman on '*The Ten domains of Family Wealth*', a new learning and development framework developed by The UHNW Institute - a non-profit think tank established in 2019. *The Ten Domains* is the Institutes inaugural project: a conceptual framework for advisors and families representing the full landscape of what an ultra-high-net-worth family wealth comprises.

Join leading experts **Cindy Radu, FCPA, LLB, LLM, ICD.C, TEP** and **Dr. James (Jim) Grubman, Ph.D, TEP** for a highly interactive dialogue featuring practical examples.

[Details and Registration](#)

Resources for STEP Members

STEP Canada's Finding Financial Security in Difficult Times - Freezing & Refreezing Guide

STEP Canada Tax Technical Committee

STEP Canada is pleased to deliver to its valued members the STEP Canada Guide to Finding Financial Security in Difficult Times - Freezing & Refreezing. The guide is effective as of October 15, 2020.

STEP Canada's TOSI Guide - 2.2nd Edition

STEP Canada Tax Technical Committee

The updated consolidated edition of the STEP Canada Guide to the Tax on Split Income (TOSI) Rules incorporates two recent CRA TOSI technical interpretations dated January 10, 2020 and April 8, 2020, and is effective as of October 1, 2020.

STEP Canada - Canada Revenue Agency Round Table Questions & Answers

STEP Canada Tax Technical Committee & STEP Canada National Conference/ Fall 2020 Speakers Series Committee

The final 2020 STEP Canada - Canada Revenue Agency Round Table Questions & Answers are now available to STEP Canada members and Speakers' Series attendees.

Executing Estate Documents in Canada in 2021: Covid-19 Amendments and How to Effect Safe (And Valid) Signings

From the STEP Canada Trust & Estate Technical Committee

STEP Canada has prepared a resources chart for its members to reference the options for having documents signed in each province and territory. This guide is effective as of January 2, 2021.

STEP Canada members can access all resources above in their My STEP portal under the resources box after logging on to step.ca.

Keep Reading STEP Inside

2020 brought forward many complex and arduous challenges for all practitioners, one of them being a large transition to working from home. STEP Canada wants to ensure that all members can still benefit from reading the informative STEP Inside magazine, no matter where you are working.

To ensure you receive all future editions of the print newsletter, consider updating your mailing address on your [My STEP profile](#). Members also have the option to ensure their preferred mailing address is their home/ current working address while still maintaining their business address in the [STEP Directory](#). If you want to ensure your address preferences are met, please email memberservices@step.ca. The January edition of STEP Inside is currently in the design stage and will be mailed out in the next two weeks.



Members can also access all previous editions of the STEP Inside magazine by logging into their My STEP profile and clicking on 'STEP Inside' under the Resources tab.

[My STEP Login Page](#)

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.

Are you seeking a new professional venture? Here are our current postings:

[Estate Planning Associate - MLT Aikins, Winnipeg](#)

Have questions?

[More on Practitioner Opportunities](#)
[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 (English & French)	March 1, 2021 June 1, 2021	February 1, 2021 May 1, 2021
STEP Diploma Program (English & French)	May 31, 2021 November 1, 2021	April 30, 2021 October 2, 2021
Essay Submission	May 1, 2021* October 1, 2021	-

**2021 topics have been updated and can be found [here](#)*

Notice from the Education Team

All program and course inquiries should be directed to our Education team at education@step.ca.

A reminder to our students that as a benefit of your membership you have access to the STEP Canada Mentorship Program to assist you with your course. To request a mentor from your local branch send an email to education@step.ca.



Upcoming TEP Talks

Register early to save your spot.

Wed
Jan 13

STEP Winnipeg
TEP Talk
Zoom

Wed
Jan 13

STEP Toronto
TEP Talk
formerly STEPPing out to Lunch
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.

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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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STEP Canada
45 Sheppard Avenue East
Suite 510
Toronto, Ontario M2N 5W9
CA