



insider



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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!



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 Collection From the STEP Canada | CRA Roundtable



All STEP members (as of December 11th) should now have received their copy of "A Collection From the STEP Canada | CRA Roundtable" 2004-2023 special 25th anniversary book.

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.

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 in the next few weeks.



2023 CPD Audit and CPD Updates



Thank you to the STEP Canada members that submitted the necessary records and passed the 2023 STEP CPD audit and review.

As a reminder, all members are required to carry out CPD as a condition of their STEP membership, proving that they are maintaining their competence to practice. STEP's CPD year runs from April 1st to March 31st, and each year STEP conducts an annual review of members' CPD records, selected at random.

STEP's CPD resources have been updated and are now all together in one place on the website. Explore the resources now to find videos, updated guides, and important information for members on how to plan for and record their CPD.

[Explore the New CPD Resources](#)

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 portal in your MY STEP account will open for processing membership renewal dues.

The deadline to renew your membership for 2024-25 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.

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

Course Fee Increase

Further to the notice posted in the last edition of STEP Insider, this is a reminder that the course fees will increase to \$1095 as of January 15th, 2024.

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. Full members are encouraged to reach out to education@step.ca for more information.

Connect With Us on LinkedIn

Check out our latest LinkedIn post:

Founder's Awards

2023 Founder's Awards for Outstanding Achievement - Canadian Recipients



Paul W. Taylor LLB, TEP
BLG LLP



Corina S. Weigl LLB, TEP
FASKEN LLP

STEP
CANADA
Supporting trust and estate practitioners
in their pursuit of excellence

Congratulations to Paul Taylor of STEP Ottawa and Corina Weigl of STEP Toronto on their well-deserved recognition as 2023 STEP 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.

*STEP – Advising Families Across Generations
#STEP #STEPCanada #FoundersAwards #Volunteer #Achievement #TrustandEstate*

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

Upcoming Branch & Chapter Events

STEP Toronto

[Blue Monday Social Event](#)

January 15, 2024
5:30pm - 8:00pm ET
Mawer Investment
Management, Toronto

STEP Okanagan

[Student Social Event](#)

January 25, 2024
3:30pm - 5:00pm PT
Earls Kelowna, Bernard
Ave, Kelowna

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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