

E-Newsletter Vol. 13 | Issue 1 | January 14, 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 Full-Day Course

Advising Executors From Death Certificate to Clearance Certificate

Our specialized Full-Day course is now officially underway, having kicked off the series in Winnipeg on January 8th to an engaged group of practitioners! See what some of the attendees had to say:

"...it was incredibly insightful. The panel of experts (who also authored the course) was excellent, providing real-life examples to illustrate their points effectively. The comprehensive slide deck, accompanied by fulsome commentary and detailed reference material, was particularly impressive. I left the course with valuable knowledge and resources that I will definitely use in the future."

"The speakers were phenomenal, and the materials were exceptional."

"I paid the non-member price. Worth every penny."

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.

Course curriculum authored by:



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Winnipeg: Wednesday, Jan 8 (Closed)
Ottawa: Wednesday, Jan 15 (1 spot left)
Kelowna: Tuesday, Jan 21 (OPEN)
Vancouver: Thursday, Jan 23 (OPEN)
Toronto: Thursday, Feb 6 (OPEN)
Edmonton: Wednesday, Feb 12 (OPEN)

Calgary: Wednesday, Feb 19 (OPEN)
Saskatoon: Wednesday, Feb 26 (OPEN)
Cambridge: Tuesday, Mar 4 (OPEN)
Halifax: Thursday, Mar 6
Montreal: Thursday, May 8

Watch your email and step.ca for registration information. In-person capacity limits will be enforced; register early to avoid disappointment!

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

Save the Date: 27th Annual National Conference

Mark the date in your calendar!

Planning is underway for STEP Canada's 27th Annual National Conference, and we hope to see you in June 2025 taking advantage of great technical sessions, networking, and much more.

Monday, June 16 & Tuesday, June 17, 2025
at the Sheraton Centre Toronto Hotel

Monday, June 23, 2025
On-Demand Replays

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



STEP's 20th Annual Private Client Awards

The STEP Private Client Awards celebrate their 20th anniversary in 2025. Seen as the hallmark of quality within the industry, these prestigious Awards will be open for entry to members and non-members from January 27th to April 11th, 2025. Winners will be announced at the Awards Ceremony in London, UK on September 18, 2025.

[Learn More About the PCAs](#)

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 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 to express your interest in joining the editorial committee (2-3 opportunities annually).

STEP's CPD Policy - Ethics Requirement

Did you know that as part of STEP's CPD policy, all members must undertake a minimum of one ethics activity annually? STEP has numerous resources to assist you in meeting your requirement:

- [View videos on the Code of Professional Conduct](#)
- [Watch the 'Learning from Complaints' webinar](#)

Or, search through the STEP CPD Knowledge Hub for articles, presentations, and more via the link below.

Questions regarding STEP's CPD policy can be sent to CPD@step.org.

STEP CPD Knowledge Hub

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](#)

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](#)

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

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 any time	Exams must be completed within 6 months of registering
CETA 2-4	March 3, 2025	February 3, 2025
	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	2025 topics can be found here

Updates

DIPLOMA PROGRAM

As we begin the Spring 2025 term, please monitor your course portal to review the course outline. Details about tutorial sessions will be announced soon – stay tuned!

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

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 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](#)

[Advising Families](#)

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