



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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**22nd National Conference 2020  
STEP/CRA Round Table:**

**Last Chance for 2020 Committee  
Consideration**

**We Want Your Questions!**

The **STEP/CRA Round Table Committee** invite all STEP Canada members to submit questions for consideration. If selected, **your question(s) will be presented at the highly anticipated round table session! Submit a Question!**



**SAVE THE DATE!**  
**STEP Canada's 22nd National Conference Preliminary  
Program to be released next week!**

**Registration is filling up, with select cities at capacity - register early!**

The Full Day Course is designed for mid- to senior-level practitioners who work with trusts and their tax implications and who wish to gain deeper insight into taxation of trusts. Highlights include technical tax issues, planning inter vivos trusts, 21 year rule options and more. [For more information and to register, please visit our website.](#)

**Featuring Expert Instructors:**



**Grace Chow**, FCPA, FCA, TEP



**Ian Pryor**, LLB, TEP



**Stay Connected!**

Our network is growing! Please follow the link to [STEP Canada's corporate LinkedIn](#) page where you can find direct links to all STEP Branch & Chapter Group pages!

[For more information, please review our LinkedIn Cheat Sheet!](#)



**Family Enterprise Advisor (FEA) Program Special Offer for STEP Members**

The Family Enterprise Advisory Program is the only program designed to help advisors augment their formidable technical skills and showcase their commitment to Family Enterprises. Create deeper relationships with family enterprise clients with the FEA program. For more information, and testimonials, [click here!](#)

[To learn more, please contact Tim Mohr: tmohr@family-enterprise-xchange.com](#)  
1-866-849-0099 ext. 225 | [family-enterprise-xchange.com](#)



**Introducing a New Designation: MFA-P Special Offer for STEP Members**

Offered by CAGP in collaboration with the Knowledge Bureau and Spire Philanthropy: Master Financial Advisor-Philanthropy! The MFA-P, provides specialized professional credentials to enable high-value philanthropic planning for individual and family legacies. Learn to have fruitful discussions, address big fears, and plan for solutions. [To learn more, please review the brochure here.](#)



## CAREER CENTRE

Seeking new professional ventures? STEP Canada is proud to offer a Practitioner Opportunity service as a great resource for connecting the highest calibre of trust and estate practitioners to employers.



[More on Practitioner Opportunity](#)  
[Post an Opportunity](#)

**Director, Tax and Estate Planning -**  
IG Wealth Management, Toronto, ON

**Manager, Tax and Estate Planning - IG**  
Wealth Management, Toronto, ON

**Trust Officer - Solus Trust,**  
Vancouver, BC

**Manager, Estate Planning - Solus Trust,**  
Vancouver, BC

## EDUCATION CENTRE

### Exam Sittings & Essay Submission Dates

Education Program	Exam/Essay Dates	Registration Deadlines*
<b>CETA</b> <i>(English &amp; French)</i>	March 2, 2020	February 2, 2020
<b>STEP Diploma Program</b> <i>(English &amp; French)</i>	May 25, 2020 November 2, 2020	April 25, 2020 October 2, 2020
<b>Essay Submission</b>	May 1, 2020 October 2, 2020	-

*\*It is recommended that you register in advance of this deadline to ensure sufficient preparation time.*

**STEP  
Diploma  
Program**

Course outlines have been added to the e-classrooms; this document is mandatory reading. Students are reminded that course information is communicated through the course website. It is the student's responsibility to check for course announcements.

[Contact Education](#)  
[More on Assessment by Exam \(Diploma Program\)](#)

**Essay  
Submission**

Our essay submission process has changed. Students must now submit essays through the online STEP Learning Centre. To submit an essay, students must log in at [step.ca](#) and purchase an "essay submission". Students will then receive access to the "Online Learning Centre" and additional instructions on essay submission. The essay topics for 2020 have been posted at [step.ca](#).

[Contact Education](#)  
[More on Assessment by Essay](#)

**Mentorship  
Program  
&  
Study  
Groups**

**STEP Canada's Volunteer Mentorship Program** is grounded in STEP's ongoing mandate to advance practitioner knowledge. If you are able to dedicate two hours per month to help groom and foster relationships with our next generation of STEP members, please reach out to our education team below.

[Contact Education](#)

## BRANCH EVENT CENTRE

We are pleased to be able to offer a glimpse of our 2019-20 Education Seminars & Events.  
Please see hyperlinks below for additional information.

Tues  
Jan  
21

**Winnipeg Branch**  
*Common Estate and Probate Planning Errors*

Thurs  
Jan  
23

**Vancouver Branch**  
*Year in Review*

Wed  
Jan  
22

**Calgary Branch**  
*"Know Your Vulnerable Client" - Capacity, Influence and Suspicious Circumstance*

Wed  
Feb  
5

**Okanagan Chapter**  
*Choice of Law and Multiple Wills Issues*

Thurs  
Jan  
23

**Edmonton Branch**  
*The Complexities of Advising on Indigenous Trusts and the Benefits for Communities and Future Generations*

Wed  
March  
11

**Southwestern Ontario Chapter**  
*An Overview of Planning for the Disabled Beneficiary*

Thurs  
Jan  
23

**Montreal Branch**

*Moving Abroad: A Review of Emigration,  
Citizenship and Residence Planning Around the  
World*

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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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