



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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## CONTENTS:

**23rd National Conference**

**eNews Updates**

**Membership Renewals**

**2021 Q1 & Q2 Branch Bundles**

**Share the Benefits of STEP**

**Practitioner Opportunities**

**Education Centre**

**Branch & Chapter Events**

**Connect with Us**

**Reminders**

**Contact Us**

## 23RD NATIONAL CONFERENCE



**The 23rd STEP Canada National Conference was an incredible success!**

Over 40 speakers and moderators presented highly insightful and technical sessions to 940 registered delegates on June 14th and 15th, making it STEP Canada's largest event ever. All sessions have now been archived and are accessible to delegates from the session pages in the National Conference App, accompanied by the chat room transcript and presentation materials. Registration remains open for new delegates to access all the sessions and resources on-demand.

On June 15th, the highly anticipated STEP Canada-Canada Revenue Agency Round Table session was presented, and senior CRA representatives answered questions submitted by trust and estate professionals. Thank you to Christine Van Cauwenberghe, Michael Cadesky, Kim G.C. Moody, Steve Fron, and Marina Panourgias for their contributions preparing and presenting this year's session.

STEP Canada would also like to thank our **sponsors** for their continued support of the National Conference.

## eNews Updates

**RE: Bill C-208**

July 7, 2021

*From the STEP Canada Tax Technical Committee*

[Click here for more information](#)

**RE: Final Questions & Answers from the 2021 STEP Canada-CRA Round Table**

July 6, 2021

*From the STEP Canada Tax Technical Committee / National Conference Committee*

[Click here for more information](#)

## Membership Renewals

**The due date for 2021-2022 membership renewals was April 1, 2021.**

There are only two days left to renew your STEP Canada membership if you haven't done so yet. Failure to renew your membership by **July 15, 2021** will result in suspension of your membership and revocation of the TEP designation (if applicable) and all member benefits.

Please submit payment through the STEP Canada website by logging into your profile here:

[Click here to login](#)

## 2021 Q1 & Q2 Branch/Chapter Bundles

Thank you to all who joined us for the 2021 Q1 & Q2 Branch/ Chapter Bundles!

All CE/CPD certificates have now been emailed to delegates that viewed the session(s) and successfully passed the required quiz as of June 22, 2021. 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 were/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. This confirmation email verifies 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 seminars or did not pass the required quiz, the archived broadcasts will remain on the app for your viewing and all quizzes will remain active for one calendar year. STEP Canada will be sending out supplementary CE/CPD certificates on a monthly basis moving forward.

## Share the Benefit of STEP

### *Did you know?*

STEP represents over 22,000 members Worldwide and over 3,100 members in Canada, and is the leading international organization for trust and estate professionals who specialize in family inheritance and succession planning. The TEP designation is an internationally recognized hallmark of professional expertise, and we are always welcoming new members to join!

If you have a colleague you think would be interested in, or benefit from STEP membership, you can share [this brochure](#) with them and invite them to contact our Member Services team at [memberservices@step.ca](mailto:memberservices@step.ca) for more information on how to join.

You can find more information on our website, [here](#).



## 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.

**Estate & Trust Specialist - Wellington-Altus Private Wealth Inc. (Winnipeg/Saskatoon)**

**Litigation Associate - Whaley Estate Litigation Partners (Toronto)**

**Trust Manager, Personal Trust Services - Desjardin (Ottawa)**

**Trust Officer - BMO Private Wealth (Victoria/Vancouver Island)**

Have questions?

**More on Practitioner Opportunities**

or

**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	September 1, 2021 March 1, 2022	August 1, 2021 February 1, 2022
STEP Diploma Program	November 1, 2021 May 30, 2022	October 1, 2021 April 30, 2022
Essay Submission	October 1, 2021* May 1, 2022	-

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

## Notice from the Education Team

### Diploma and CETA Students:

Marks for the May 31st diploma exams and the June 1st CETA exams were posted to student accounts under "My Courses & Marks" on July 5th, 2021. If you do not see your grade please contact [education@step.ca](mailto:education@step.ca).

### Graduating Diploma and Essay Students:

Congratulations to our students that passed their final diploma exam or have successfully completed their final essay. Remember that in order to use the TEP designation, you must submit your Full Membership Upgrade application to [education@step.ca](mailto:education@step.ca) and receive approval for full membership. To request the form, email [education@step.ca](mailto:education@step.ca).

### NEW THIS TERM:

STEP Canada will be preparing a photo collage of our new TEPs to post on LinkedIn. If you wish to have your photo included, please email it to [education@step.ca](mailto:education@step.ca) no later than August 15, 2021.

## Upcoming Branch & Chapter Events

TEP Talks will resume in September.

[Click here to view the upcoming schedule for the 2021-2022 Branch/Chapter Bundle seminars.](#)

## Connect with Us

### Have you connected 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.

Follow [STEP Canada's corporate page](#).

You can find the link to your local branch/chapter group on the STEP Canada corporate page.

Need help? View the [LinkedIn Cheat Sheet](#).



## 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](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.

[RETURN TO TOP](#)

[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