



E-Newsletter Vol. 12 | Issue 7 | July 9, 2024

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!

Congratulations To Our Canadian Finalists



STEP has announced the shortlist for the 2024 Private Client Awards after a record 373 submissions from 28 countries. We are thrilled to recognize the Canadian finalists for this year's Private Client Awards!

Boutique Firm of the Year
NIKA LAW LLP

Employer of the Year
NIKA LAW LLP

Family Business Advisory Practice of the Year
Crysalia

Multi-Family Office Team of the Year
Our Family Office Inc.

Philanthropy Team of the Year
Northwood Family Office
TD Wealth

Trusted Advisor of the Year
Pamela Cross ICD.D, TEP, LLB, Borden Ladner Gervais

Vulnerable Client Advisory Practice of the Year
NIKA LAW LLP

The STEP Private Client Awards are seen as the hallmark of quality within the private client industry. Let's wish our finalists the best of luck!

Winners will be announced at the awards ceremony on September 19, 2024 at the London Hilton on Park Lane in London, UK.

Click below for more details and to book a table:

[More Information](#)

STEP Canada-USA Cross-Border Conference



IN-PERSON | October 6 - October 8, 2024
Chicago Marriott Downtown Magnificent Mile

We are proud to share that STEP Canada and STEP USA have collaborated to offer this unique event, which provides an excellent opportunity to grow, educate, and nurture a network of practitioners who focus on the complicated issues that arise between the two countries.

The program committee of STEP Canada and STEP USA members has created a comprehensive program featuring 32 leading specialists discussing the latest trends and developments in cross-border estate planning and wealth management in Canada and the US. The event will offer in-person attendees 1.5 days of engaging events and unique experiences.

STEP members have exclusive first access to this event, register today to secure your place.

[Details & Registration](#)

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](#)

2024-25 Membership Renewals

With the 2024-25 renewal campaign ending on June 28th, we are pleased to share that over 95% of STEP Canada's Full members and 89% of Affiliate/Associate members have renewed for another year. STEP is proud to continue offering you a wide range of benefits, such as use of the TEP designation (if applicable), discounts on programs/seminars, member-only publications and resources, access to the Searchable Resource Tool (SRT), advocacy and representation from STEP, and much more.

Membership List Email Scams

Several members have reported receiving an email trying to sell them STEP member data. These emails are scams and STEP does not sell its membership lists. The company sending these emails has no affiliation with STEP and has never received a copy of our data. Should you receive one of these emails, we encourage you to block the sender.

2024 STEP CPD Audit

The 2024 Continuing Professional Development (CPD) Audit Review is due to begin on **August 27, 2024**. This is a friendly reminder to ensure that your CPD records for April 1, 2023 - March 31, 2024 are up-to-date. It is recommended that members maintain a record of their CPD activities and reflective practice throughout the year to ensure that, should you be chosen at random to submit your CPD records for review, you can easily comply with the audit requests.

Members who are retired, on maternity or long-term leave, should apply for Retired or Restricted Membership to ensure their membership records are up-to-date. Once approved, this will avoid you being selected for the audit as you will be entitled to a CPD exemption.

STEP will audit 3% of eligible members (including Affiliates, Associates, and Full Members). Members selected for audit at random are notified via email and will be given two months to submit their CPD records for review.

If you have questions or concerns please contact the CPD Team at cpd@step.org.

[Learn More About CPD](#)

New Digital STEP Journal

STEP recently launched a brand-new digital platform for STEP members, bringing you a sophisticated and immersive STEP Journal reading experience that will change how you engage with the publications.

The My Journal section has three exciting tools members can use:

- **My personalized feed:** curate a tailored feed, based on your topic and region preferences. This section updates when new articles are published, so you'll always be up to date.
- **My saved articles:** save articles to read for later – you will always be able to find your favourite articles from the STEP Journal and Trust Quarterly Review, all in one convenient spot.
- **My CPD:** log articles you have read, along with what you have learned, as part of your continuing professional development (CPD) requirement. Reflections are also saved to your member profile.



Journal | Issue 3, 2024 | June 2024

[Explore the New Digital Journal](#)

Upcoming 2024-25 Program Season

Your local branch/chapter boards are hard at work planning exciting education and networking opportunities for the 2024-25 program season, beginning in September. Members can look forward to receiving news about the excellent upcoming opportunities to engage, learn, and network at their upcoming local branch events.

We are proud to highlight the below branches and chapters who have prepared a preliminary program schedule:

[STEP Atlantic](#)

[STEP Calgary](#)

[STEP Edmonton](#)

[STEP Montreal - coming soon](#)

[STEP Okanagan](#)

[STEP Saskatchewan](#)

[STEP Toronto](#)

[STEP Vancouver](#)

[STEP Winnipeg](#)

Members are encouraged to monitor the event calendar to see when new events are added.

[View the Event Calendar](#)

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.

[Director of Tax, Retirement, and Estate Planning - CI Global Asset Management - Toronto, ON](#)

[Trust Officer - TD Wealth Private Trust - Edmonton, AB](#)

[AU-03 Auditor Positions - Canada Revenue Agency - AB, BC, MB, SK](#)

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	September 4, 2024	August 4, 2024
STEP Canada Diploma Program All Courses	November 4, 2024	September 1, 2024
	May 26, 2025	March 1, 2025
Essay Submission	October 1, 2024	*2024 topics can be found here

Updates

DIPLOMA PROGRAM

Registration for the fall term is well underway. To register for your next course, go to your MY STEP account and select 'Diploma Program Registration'. A friendly reminder that the last day to register for the November exam is on [September 1, 2024](#).

Check your classroom in the coming weeks for the schedule to our virtual learning sessions for the fall term: two mentorship circle sessions and one instructor tutorial. Don't miss out on these essential learning sessions to help prepare you for every step of your education journey.

A reminder for Diploma students that have completed their program: To receive your TEP designation, you must submit your Full Membership Upgrade application to education@step.ca.

Connect With Us on LinkedIn

Check out one of our recent LinkedIn posts:



Grade Release Day!

As of today, June 27, all students enrolled in the STEP Canada Diploma Program in Trusts and Estates can login to their MY STEP account to view their grades under the "My Courses & Marks" section.

Congratulations to all students that are moving on to the next course, and those that are now eligible to apply for the TEP designation!

Click here to sign in -> https://step.ca/sign_in

Registration is open for students to book their next course, and will close on September 1, 2024 for the November 4, 2024 exam date.

Are you interested in finding out more about our Diploma Program? Click here -> <https://step.ca/diploma>

#STEP #STEPCanada #STEPCanadaDiplomaProgram #TrustsandEstates #Education #Membership

For more 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](#)

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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STEP Canada
45 Sheppard Avenue East
Suite 510
Toronto, ON M2N 5W9 - Canada
Telephone: 416-491-4949