



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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2019 STEP Canada Awards



Congratulations to these well-deserving STEP members!

STEP Canada celebrates extraordinary and magnanimous voluntary contributions, academic excellence, and fan favourites with the announcement of its **2019 Award Recipients**. Normally we celebrate these achievements in person at our National Conference, this year we will celebrate from a distance - with much deserved recognition to these outstanding STEP members!

New Resources for Members

National Conference Archived Material

Trusts, both testamentary and *inter vivos* are an important part of a STEP member's planning toolkit. The below paper canvases the nuances of the taxation of donations made by an estate, loss restriction events applicable to trusts, 21-year planning with non-resident beneficiaries, non-resident trust rules, and the taxation of a disposition of an interest in a trust.

Please follow these links to the [PowerPoint Presentation](#) and [Paper](#) from the 2017 STEP Canada National Conference session, "Taxation of Trusts and Their Beneficiaries: Rarer Tips and Traps" presented by Angela Ross of PwC, Elie Roth of Davies LLP, and Grace Chow of Cadesky Tax.

This presentation was voted by delegates to be the best concurrent presentation of the 2017 conference.
Don't forget - you can login to your step.ca account and access this and other great resources.

Announcing TEP Talks



STEP Canada is happy to announce a new complimentary members-only online networking opportunity!

Organized and hosted by your local branch/chapter, TEP Talks will be an opportunity for members to connect virtually once a month and discuss today's hot topics, current cases, and irksome situations while networking with your fellow STEP members. Learn with other STEP professionals from a number of disciplines and build your network.

TEP Talks will start taking place in the fall (and sooner for members of some branches and chapters). Stay tuned for more information!

2020 Speaker Series

The introduction of our 2020 Speakers' Series once again demonstrates STEP Canada's educational leadership in the trust and estate industry.

Virtually all of the 55 speakers who agreed to present topics at STEP's 2020 Annual National Conference have agreed to participate in our new 2020 Speakers' Series. We are very grateful to have the support of these talented practitioners who are willing to share their expertise online. In the next few months, we will be professionally recording the presentations and panels. Beginning September 15, 2020, STEP will broadcast a total of 20 sessions, one on Tuesdays and one on Thursdays, at 12:00 noon eastern time.

Each prerecorded session will last between 75 and 90 minutes. As the video plays, a chat will run in tandem with the presentations, allowing attendees to share their experiences, ask the speakers questions, and network with each other. The event will be co-creative, and insights generated during the discussion will be published in an actionable resource for participants.

2020 Speakers' Series App. The 2020 conference app will evolve into the 2020 Speakers' Series app and will serve as the passport to all presentations, papers, pre- and post-broadcast links, and transcriptions of chatroom discussions.

Accredited Continuing Professional Development for Delegates. STEP has already secured accreditation for the conference from many professional associations, and this accreditation will carry over into the 2020 online Speakers' Series.

Broadcast Dates and Times:

Tuesday, September 15	Thursday, September 17
Tuesday, September 22	Thursday, September 24
Tuesday, September 29	Thursday, October 1

Tuesday, October 13	Thursday, October 15
Tuesday, October 20	Thursday, October 22
Tuesday, October 27	Thursday, October 29
Tuesday, November 3	Thursday, November 5
Tuesday, November 10	Thursday, November 12
Tuesday, November 17	Thursday, November 19

Delegate registration fees will be determined in mid-summer.

STEP Private Client Awards

The STEP Private Client Awards are seen as the hallmark of quality within the private client industry. Open globally to both STEP members and non-members, these prestigious Awards recognize and celebrate excellence among private client solicitors, lawyers, accountants, barristers, bankers, trust managers and financial advisors.

Entries for the STEP Private Client Awards 2020/21 are now open, [view categories and criteria](#).

Reminder - the **June 26, 2020** deadline for submissions is fast approaching.



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 (<i>English & French</i>)	September 8, 2020	August 8, 2020
STEP Diploma Program (<i>English & French</i>)	August 3, 2020** November 2, 2020	October 2, 2020
Essay Submission	October 1, 2020	-

***An additional exam session is being offered on August 3rd, 2020. Please review the updated statement [here](#).*

Notice from the Education Team

An additional exam session for the diploma courses will be offered on August 3, 2020. Provisional registration into the next course is recommended for students that plan to take two exams this year and are completing their first exam in August. Affiliates/Associates should refer to the updated COVID-19 Exam Notice that is posted on the course website for detailed information and instructions on how to request an exam transfer and/or provisional registration. Questions concerning the current COVID-19 situation and the examinations should be directed to the Education Manager at aedwards@step.ca.

Grades from the May 25th diploma exams and the June 1st CETA (2-4) exams will be posted to student accounts at step.ca by June 25th, 2020. Grades are released by course. Once grades are released for a particular course, an announcement will be posted on the relevant course website.

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

[Contact Education](#)

Branch Event Centre

We are very happy to announce that the local branches and chapters are beginning to utilize the STEP Zoom platform for virtual events. Stay tuned for more events to come!

Thurs
June
11

Winnipeg Branch

Student Networking Event on Zoom
Trivial Pursuit

Tues
June
23

Toronto Branch

STEPping out to Lunch... Online!
TEP Talks

Membership Renewals

Remember, to retain your membership status in good standing, please complete the declaration and submit payment through the STEP Canada website, [here](#), by **June 30, 2020**.

Need help? Contact our Member Services team at memberservices@step.ca.

Career Centre

Seeking new professional ventures?
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.

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

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.

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