



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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2022-23 Board of Directors

We are thrilled to present STEP Canada’s 2022-23 Board of Directors. The 17 STEP members that make up our national board are leaders in the trust and estate industry.

The Board of Directors assume a leading role in communicating the views of Canadian members to governments, tax authorities, regulators, and the public.

With a deep appreciation for their vision and leadership, please join us in thanking them for their dedicated support to STEP Canada and the trust and estate industry!

 Chris Ireland CPA, CA, TEP National Chair, PPI Advisory, Vancouver	 Rachel Blumenfeld LLB, TEP National Deputy Chair, Aird & Berlis LLP, Toronto	 Richard Niedermayer QC, TEP National Deputy Chair, Stewart McKelvey, Halifax	 Brian Cohen LLB, TEP National Treasurer, Cowing WLG (Canada) LLP, Toronto	 Aileen Battye LLB, TEP National Secretary RBC Wealth Management, Vancouver	 Pamela Cross LLB, TEP National Past Chair, Borden Ladner Gervais LLP, Ottawa
 Elaine Blades JD, TEP Director at Large RBC Wealth Management, Royal Trust Toronto	 Tannis Dawson CPA, CA, CFP, RRC, TEP, FEA Director at Large TD Wealth Winnipeg	 Ruth Spetz QC, TEP, ICD.D, FEA Director at Large Borden Ladner Gervais LLP Calgary	 Salvatore Amello QC, TEP Edmonton Branch Chair MLT Aikins LLP	 Yogesh Bhatnalla CPR, CGA, CFP, TEP Vancouver Branch Chair KPMG LLP	 Robbie Brown CPA, CA, CFP, TEP Atlantic Branch Chair BMO Private Wealth
 Nicole Ewing LLB, CLU, TEP Ottawa Branch Chair TD Wealth	 Paule Gauthier CPA, CA, LL.M. (fisc), TEP Montreal Branch Chair RBC Wealth Management Services	 Harmanjit Mavi JD/MBA, TEP Winnipeg Branch Chair MLT Aikins LLP	 Kenneth Keung CPA, CA, TEP Calgary Branch Chair Moody's Tax / Moody's Private Client	 Corina Weigl LLB, TEP Toronto Branch Chair Fasken LLP	 STEP Canada www.step.ca

[Click here to view our official Board Notice](#)

24th National Conference Success

A record-breaking 958 delegates registered for this year's National Conference, tuning in from all across the country for timely and technical presentations and two in-person networking opportunities. We would like to thank the 2022 National Conference Programming Committee, panelists, event staff, sponsors, and delegates, for making this year a success.

On Sunday, June 12th, the newly reconstituted STEP Canada Board of Directors met in-person to network and connect with each other, committee chairs, invited guests, and STEP Worldwide representatives. Past Chair, Pamela Cross, was recognized for her excellent leadership in guiding STEP Canada through the pandemic, and Brian Cohen was recognized for receiving the Michael Cadesky Volunteer of the Year Award.



On Wednesday, June 15th, history was made as delegates tuned in to watch the CRA/STEP Canada Round Table session for the first simultaneous in-person and virtual viewing experience in 11 locations crossing 5 separate time zones.



On Thursday, June 16th, 11 Regional Social Events were held across the country featuring cocktails, hors d'oeuvres, and a door prize at each location. Delegates enjoyed networking and reconnecting with colleagues.



For those who were unable to tune in to the live broadcast, or who have not yet registered, all sessions have now been archived and are available to view on-demand.

[Click here for details and registration](#)
Registration will remain open until October 31, 2022

Thank you to our National Conference Sponsors

On behalf of STEP Canada and its over 3,250 members, we would like to extend a huge thank you to all of our dedicated sponsors that make the 24th National Conference possible.

[Please click here to view a special thank you message for our Sponsors](#)

2021 STEP Canada Awards

On Friday, June 17th, as part of the 24th National Conference, STEP Canada was thrilled to announce the recipients of our 2021 Awards. The Awards presentation included acknowledgment of the STEP Worldwide Canadian Founder's Award Recipients, the Branch/Chapter Volunteers of the Year, the Student Award Winners, the 2021 STEP Inside Best Article Winner, the 2021 STEP Canada National Conference Best Session Winner, and the Michael Cadesky Volunteer of the Year Award.

Please join us in congratulating all award winners!

[Click here to view the Awards announcement video](#)

2022-23 Membership Renewals

If you have not yet renewed your annual membership, this is a friendly reminder to submit payment at your earliest convenience. All STEP Canada membership renewals were due **April 1, 2022**.

Renewing your membership with STEP Canada will allow your continued use of the TEP designation (if applicable) and grants multiple membership benefits such as discounts on programs/seminars, access to member-only publications and resources, use of the SRT, representation from STEP, and much more.

Failure to process your 2022-23 membership renewal by June 30, 2022 will result in the suspension of your membership.

[Click here to sign in](#)

Latest STEP Canada eNews

June 20, 2022

RE: Submission to the Department of Finance on Section 84.1

[Click here for more information](#)

Searchable Resource Tool (SRT)

Have you checked out STEP Canada's **new** Searchable Resource Tool?

As a member, you now have access to a library of STEP Canada content including a collection of presentation decks, formal papers, additional resources, and articles from Branch & Chapter Events, National Conferences and Webcasts, and the STEP Inside newsletter.

[Access the STEP Canada SRT today by logging in to your MY STEP account.](#)



**STEP
GLOBAL
CONGRESS 2022**

Thought leadership
for tomorrow's world

7-8 JULY 2022, LONDON

[Register](#)

STEP Global Congress 2022

Join STEP in London on July 7th-8th, 2022!

This event offers delegates the opportunity to hear from speakers at the forefront of their profession and network with some of the world's leading advisors. As an attendee, delegates will not only have the chance to see the future direction of STEP, but will also be able to help steer the campaigns that STEP will be launching for the coming decade and ensure its position as the pre-eminent worldwide professional

association for those advising families across generations.

[Details and registration](#)

17th Annual Private Client Awards

STEP is thrilled to announce that 337 entries were received from 27 countries, a record number of submissions for the Private Client Awards.

Thank you and good luck to all Canadians that entered. The finalists will be released in June, and the winners will be announced at the Awards Ceremony, taking place in London, UK on September 14th, 2022.

[Details and registration](#)

Family Enterprise Advisor

Only the FEA designation prepares advisors to be fluent in the complexities and nuances of serving business families.

The **FEA designation** is the benchmark in family business advising. Designed for professionals with significant technical knowledge, the FEA Program will add to your skill set to better serve your family enterprise clients. In the crowded field of professional advisors, there is one sure path to standing out: the FEA Designation.

Our Fall 2022 Virtual Cohort – starting this September - is your **last chance** this year to become fluent in family enterprise! STEP Members receive a 10% discount. For more information, or to get the inside scoop from a certified TEP, FEA, contact Tim Mohr at tmohr@familyenterprise.ca.



"The FEA program taught me how to serve my clients with greater impact. I consistently unearth more considerations that lead to better and more meaningful solutions – not just from a financial perspective, but outcomes that serve the family for the better. It's helped me build stronger client relationships."

Sloan Levett, CPA, CA, CFP, TEP, FEA
Fuller Landau Family Office Services Inc.

2022-23 Branch/Chapter Programming

All STEP Canada branches and chapters will once again be offering a Bundle of 6 unique technical seminars for the 2022-23 programming season. This seasons Bundle will follow a hybrid model, with branches/chapters having the option to host their local sessions in-person if government directives allow.

The two National sessions will be broadcast for online viewing only, taking place on **Wednesday, September 14th, 2022 at 12:00 noon ET** and **Thursday, January 19th, 2023 at 12:00 noon ET**.

Stay tuned for more additional details, registration, and sponsorship opportunities which will be released in early summer.

STEP Inside

STEP Inside is the official publication of STEP Canada.

The May edition of STEP Inside is now available to all members and can be access by logging in to their MY STEP account at step.ca.

STEP Canada would like to express a heartfelt appreciation to all authors, reviewers, and members of the editorial board for their contributions to this issue; and for sharing their valuable expertise with STEP members across the country.

As always, the editorial committee welcomes article proposals from all members for future editions at news@step.ca.

Don't forget: As a benefit of membership, all members are entitled to receive a hard copy of this valuable resource in addition to the electronic copy. Members can review and update subscription preferences in their MY STEP accounts.



CE/CPD Credits for Past Events

CPD certificates for the 2021-22 Branch Bundle sessions will be sent in July 2022. Members who have not yet taken the quiz for any sessions they have viewed can still do so to receive their CPD credits.

CPD certificates for the 24th National Conference will be sent in August 2022.

If you have concerns regarding your credits, please email memberservices@step.ca.

Access to all apps including the 2020 Speakers' Series, 2021 Q1 & Q2 Branch Bundles, 2021 National Conference, 2021-22 Branch Bundles, and 2022 National Conference will only be available until December 31, 2022.

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.

Senior Trust & Estate Officer - Cidel Trust Company (Calgary, AB)

Estate and Trust Specialist - Scotiastrust / MD Private Trust (Quebec) *French*

Trust Officer / Executive Trust Officer - Indigenous Trust Services, TD Wealth (Winnipeg, Saskatoon, or Regina)

Estate Paralegal - Campbell Froh May & Rice LLP (Richmond, BC)

Director of Tax - RBC Wealth Management (Toronto, ON)

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, 2022 March 1, 2023	August 1, 2022 February 1, 2023
STEP Canada Diploma Program	November 7, 2022 May 29, 2023	September 7, 2022 March 29, 2023
Essay Submission	October 1, 2022 May 1, 2023	*2022 topics can be found here (new topics will be released in January 2023)

Updates

STEP Canada is pleased to announce the launch of our new mentorship program!

With the addition of new learning resources and networking opportunities built into our diploma program, we have re-evaluated our mentorship program to ensure that STEP continues to offer a valuable experience to our members.

Our new mentorship program is focused on **career enhancement** and will aim to facilitate a relationship where knowledge and experience are shared between mentors and mentees that work in the same industry.

If you would like more information about becoming a mentor or a mentee, please email education@step.ca.

Diploma Program

Grade release for the Spring diploma exams is July 4th. Grades are released as they become available by course.

Diploma Fee Increase Notice: STEP Canada is committed to providing exceptional value for to our students; our fees have consistently reflected this commitment. STEP Canada has not increased course fees since January 2019. As of August 1, 2022, the new course fee will be \$995. Our course fees continue to be all-inclusive (course material, study resources, and examination). This increase will be invested back into our student programming so that we can continue to enhance our educational services. Any questions can be sent to our Education team at education@step.ca.

CETA: CETA grades have been released for courses 2-4. To check your grade, login to your MY STEP account and click "My courses & marks". Congratulations to our students that have completed their program.

Certificates: Program completion certificates will be mailed out to all those that have finished a STEP Canada education program between 2020 and the most recent term. The preferred address in your STEP Canada profile will be used. Please ensure this is up to date by logging in to your MY STEP account at step.ca and editing your profile information.

Upcoming Branch & Chapter Events

Stay tuned for the launch of the 2022-23 Branch Bundles and 2022-23 TEP Talks.
More information will be released in August 2022.

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

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[STEP Member Directory](#)

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