

E-Newsletter Vol. 12 | Issue 6 | June 11, 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!

## 26th Annual National Conference



### BUILDING CONNECTIONS, SHARING KNOWLEDGE

On June 3rd & 4th, over 740 trust and estate practitioners descended on the Sheraton Centre Toronto Hotel for our sold-out 26th National Conference to engage with other delegates, connect with industry organizations, and learn from our expert speakers on thought-provoking topics.

Some of our favourite highlights included:

- Eighteen outstanding technical sessions on unique and timely topics of importance to trust and estate professionals
- Monday morning opening remarks from STEP Canada Chair, Rachel Blumenfeld, and 2024 National Conference Program Committee Member, Troy McEachren, who welcomed and energized us for a productive day ahead
- A dynamic and riveting keynote presentation from Jarvis Sam who dove deep into the transformative powers of Diversity, Equity, and Inclusion, and how it can redefine the trust and estate community
- An unforgettable SOLD OUT evening at Arcadian court featuring the company of friends and colleagues, delicious treats and tasty snacks, and of course the incredible entertainment from local artists
- The Michael Cadesky Volunteer of the Year Award was presented to Richard Niedermayer of Stewart McKelvey in Halifax – congratulations to Richard on this well-deserved acknowledgement of your commitment and contribution to STEP Canada!

Thank you to our delegates, staff, and industry guests for making this year so special.

All registered delegates now have access to the online on-demand replays of all 18 sessions. If you're not yet registered but want to view this excellent content and earn CPD credits, please click the link below to register.

[Details & Registration](#)

## Thank You to Our Sponsors



We would like to extend a big THANK YOU to our incredible and dedicated industry sponsors for their financial support that makes our National Conference possible. We encourage you to [learn more](#) about these generous organizations and the work that they do to support the trust and estate industry.

We made a special thank you video for them - please click below to watch it!

[Watch Our Sponsor Video](#)

## 2024-25 Membership Renewals

Final Reminder - It's Time to Renew Your STEP Membership

Ensure your membership remains in good standing and renew before June 28th to avoid suspension.

Renewing your membership with STEP Canada will allow your continued use of the TEP designation (if applicable) and grant you multiple membership benefits such as access to the recently held 2024 Federal Budget Webcast, discounts on programs/seminars, member-only publications and resources, access to the Searchable Resource Tool (SRT), advocacy and representation from STEP, and much more.

STEP Canada is proud to continue increasing the value of your membership by delivering these and other benefits, without any increase to your annual membership fee.

Failure to renew will result in the suspension of your membership and revocation of your membership benefits.

[Login Today to Renew Your Membership](#)

## Save the Date: STEP Canada-USA Cross-Border Conference



Do you have a specialized interest in Canada-USA Cross-Border topics? Then save the date in your calendar for the inaugural STEP Canada-USA Joint Cross-Border Conference!

This in-person conference will showcase numerous opportunities for cross-border networking, and will take place in **Chicago** from **Sunday, October 6th** through **Tuesday, October 8th, 2024**. This will be an immersive experience of valuable professional development and networking opportunities. There will be limited capacity for this event.

Watch [step.ca](#) for more information to be released soon!

## Our 2024-25 Board of Directors

We are proud to present STEP Canada's 2024-25 Board of Directors!

The 17 STEP members that make up our national board are leaders in the trust and estate industry, and will assume an instrumental 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.

[View our 2024-25 Board of Directors](#)

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## Branch & Chapter Board Transitions

Following the Annual Branch/Chapter Meetings and STEP Canada's Annual General Meeting, some branches and chapters have seen a transition in their Boards. We encourage you to visit our website to become familiar with the dedicated volunteers who support you and your membership at the branch level.

[View Your Branch/Chapter Board Members](#)

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## 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 Edmonton](#)

[STEP Okanagan](#)

[STEP Saskatchewan](#)

[STEP Toronto](#)

[STEP Winnipeg](#)

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## Sources for CPD/CE Credits



CPD is a requirement for maintaining STEP membership for all membership types that are currently working.

**Did you know** that reading the STEP Journal and STEP Inside also count towards STEP's CPD requirement?

The global STEP office will begin the 2024 CPD audit at the end of August, and members are encouraged to watch their emails and take swift action if they are audited.

Any questions regarding CPD or your selection in the CPD audit can be sent to the global office at [CPD@step.org](mailto:CPD@step.org).

[View STEP's CPD Policy](#)

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## 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.

[Tax & Estate Planning Accountant - IG Private Wealth Management - Any Canadian Province Outside of Quebec](#)

[Estate Planning & Administration Lawyer - Lindsay Kenney LLP - Vancouver, BC](#)

[Director, Tax & Estate Planning - Mackenzie Investments - Winnipeg, Calgary, Toronto, Montreal](#)

[Executive Trust Officer - CIBC Wealth Management - Toronto, ON](#)

[Manager Tax - CIBC Wealth Management - Toronto, ON](#)

Have questions?

[More on Practitioner Opportunities](#)

or

[Post an Opportunity](#)

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## 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 <a href="#">here</a>

## Updates

### EXAM GRADE RELEASE

**Diploma (May 27th exam)** and **CETA 2-4 (June 10th exam)** grade release dates are June 26th for Diploma and July 12th for CETA 2-4. An email will be sent to you when your grade is available in your MY STEP account, under "My Courses & Marks". Should you wish to register for your next course prior to receiving your course grade, you may do a **provisional registration**. The provisional registration form can be found in your course platform.

For Diploma and CETA students who have successfully completed their program, congratulations on this achievement. Certificates will be mailed out in late summer. **Please ensure your preferred mailing address is updated on your profile no later than June 30th.**

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## Connect With Us on LinkedIn

Check out one of our recent LinkedIn posts:



*Are you ready? We are! It's time for registered in-person delegates to start planning and packing – the fun begins on Monday, June 3rd at 7:45am.*

*KNOW BEFORE YOU GO:*

- 1) Delegates staying at the hotel are strongly encouraged to pick up their registration kit on Sunday evening between 4:00pm – 8:30pm to avoid lines on Monday morning*
- 2) Delegates will not be able to enter a session without a name badge featuring their unique QR code*
- 3) Wi-Fi, snacks, and lunches are included in your in-person conference registration*
- 4) It is notoriously difficult to maintain consistent temperatures in the conference rooms, please bring a layer to keep you comfortable*
- 5) The Conference App is now available – login before you arrive to explore how it can improve your conference experience*

*Not registered for in-person attendance? Please don't come to the venue – we have reached our in-person capacity and cannot accept any onsite registrations. We encourage you to register for online on-demand viewing:*

<https://lnkd.in/enPwnhQp>

*A special thanks to our generous sponsors who have made this experience possible! Please learn more about these wonderful sponsors by clicking the link below:*

<https://lnkd.in/eGZqDScf>

*We look forward to seeing everyone soon!*

*[#STEP](#) [#STEPCanada](#) [#TEP](#) [#STEPCanConferences](#)[#trustandestate](#) [#Networking](#)*

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](#)

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[Upcoming Events](#)

### STEP Winnipeg

[Student Networking Event](#)  
June 13, 2024  
4:00pm - 7:00pm CT  
Across The Board Game  
Cafe, Winnipeg

### STEP Calgary

[Student Event](#)  
June 13, 2024  
4:30pm - 6:30pm MT  
Calgary Petroleum Club,  
Forester's Lounge,  
Calgary

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## 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.

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## Quick Links

[STEP Canada Website](#)

[STEP Member Directory](#)

Click to [edit Email Preferences](#) or [Unsubscribe](#) from this list.

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