

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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STEP CANADA  
SEARCHABLE RESOURCE TOOL



### **NEW!**

**STEP Canada is thrilled to launch our new Searchable Resource Tool (SRT).**

Members can now easily search and access content from our library, including a collection of PDF versions of presentation decks, formal papers, additional resources (supplementary materials, charts, glossaries), and articles from Branch/Chapter Events, National Conferences and Webcasts, and the STEP Inside Newsletter.

The SRT will continue to grow, and users are encouraged to refer to the Chronological List of Contents (CLC) for a current index of contents.

We are proud to increase the value of your membership in delivering this benefit to you without any increase to your annual membership fee.

Access our Searchable Resource Tool by logging in to your **MY STEP** account.

## 2022-23 Membership Renewals

It's time to renew your STEP Canada membership!

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.

Members must process payment and sign the annual membership declaration by **April 1, 2022**. Complete your renewal early to ensure you remain a member in good standing.

[Click here to sign in](#)

## 24th National Conference

Join us from June 15th-17th for a lineup of outstanding sessions featuring over 40 respected experts who will deliver the highly regarded technical content this conference is known for! This year's conference will once again follow a virtual model, having all sessions pre-recorded, professionally edited, and broadcasted through the STEP Canada 24th National Conference App.

New this year we are kicking off with the highly anticipated 2022 CRA/STEP Canada Round Table on June 15th. Delegates will have the option to view this session online or in-person at a remote location in their region (reservations required).

Register before March 31st to take advantage of the early bird rates!

[Details and Registration](#)

## STEP Global Congress 2022

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

Be there when STEP identifies future trends and helps shape our response to the challenges and opportunities they present. Save on registration with an early bird rate if you register by April 29, 2022.

[Details and Registration](#)

## 17th Annual Private Client Awards

Calling all Canadians! Showcase yourself, your team, and/or your firm by entering any of the 19 available categories at this year's PCAs. Increase representation for your industry and don't miss the opportunity to showcase yourself on STEP's international stage!

Entries for the 17th Annual STEP Private Client Awards (PCAs) are now open and will run until April 14th, 2022. This year there are two new awards: Digital Assets Practice of the Year and Employer of the Year.

Open to both STEP members and non-members, these prestigious awards are your opportunity to shine a spotlight on your achievements over the past year and raise the profile of your team, firm, and jurisdiction.

[More details](#)

[View past winners](#)

## STEP Inside

STEP Inside is the official publication of STEP Canada.

Published each year in January, May, and October, this publication contains industry news and articles, case studies, as well as regulatory and taxation updates.

As a benefit of membership, all members are entitled to receive a hard copy of this valuable resource, in addition to the electronic version that is emailed. Members can also view previous editions under the Resources section of their MY STEP account.

Review your subscription preferences in your membership profile when you renew your STEP membership!



## CE/CPD Credits for Past Events

The Member Services team sends supplementary CE/CPD credit certificates monthly for the 2021 Q1 & Q2 Branch Bundle and the 23rd National Conference.

If you have not yet viewed the seminars or completed the quizzes for either event, the archived broadcasts remain available on the app for your viewing. Please contact [Member Services](#) if you have questions about your CE/CPD credit certificates.

**December 2021 Update:** CPD certificates have now been sent for the 2021-22 Branch/Chapter Bundle seminars viewed up until December 10th, 2021. If you did not receive your certificate and/or you have concerns regarding your credits, please email [memberservices@step.ca](mailto:memberservices@step.ca). Another CPD certificate will be sent in July 2022 for all remaining Bundle seminars.

[Details and registration for the 2021-22 Branch/Chapter Bundle](#)

## 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.

**Advisor, Business Strategies - Desjardin (Montreal, QC)**

**Estate & Trust Advisor - MD Financial Management (Toronto, ON)**

**Senior Trust Advisor - Wyth Financial (Saskatoon, SK or remote)**

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                    | June 1, 2022<br>September 1, 2022 | May 1, 2022<br>August 1, 2022                           |
| STEP Canada Diploma Program | May 30, 2022<br>November 7, 2022  | March 30, 2022<br>September 7, 2022                     |
| Essay Submission            | May 1, 2022<br>October 1, 2022    | *2022 topics can be found <a href="#">here</a>          |

### 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](mailto:education@step.ca).

#### **Diploma Program Re-launch**

The new course platform has been launched and new resources are available such as:

- On-demand video lectures
- Peer Leadership opportunities
- Student study sessions

A recording of the orientation session is posted in each course website. No changes have been made to the course material as a result of the updated platform and resources.

Note: Please remember that our diploma course registration deadlines have changed to 60 days before the exam.

Any questions can be sent to our Education team at [education@step.ca](mailto:education@step.ca).

## Upcoming Branch & Chapter Events

*\*Save the date - registration opening soon*

|                  |   |                 |   |
|------------------|---|-----------------|---|
| Tues<br>March 15 | <b>STEP Montreal</b><br>TEP Talk<br>12:00 noon - 1:00 pm ET<br>Zoom       | Wed<br>March 16 | <b>STEP Calgary</b><br>TEP Talk<br>8:00 am - 9:00 am MT<br>Zoom               |
| Tues<br>April 5  | STEP Southwestern Ontario<br>*TEP Talk<br>12:00 noon - 1:00 pm ET<br>Zoom | Wed<br>April 13 | STEP Edmonton<br>*Student Networking Event<br>12:00 noon - 1:00 pm MT<br>Zoom |

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

## 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.

### [Quick Links](#)

[Advising Families](#)

[STEP Member Directory](#)

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[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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