



E-Newsletter Vol. 12 | Issue 3 | March 12, 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

Registration is now open! Join us in-person on June 3-4 at the Sheraton Centre Toronto Hotel for STEP Canada's 26th National Conference. This year's program will feature over 50 panelists at 18 sessions discussing the latest trends, traps, and developments in the trust and estate industry, along with a NEW style of STEP Canada social event that will offer numerous opportunities to network and enjoy great food.

To accommodate all our delegates and their unique schedules, the 2024 conference will again offer a hybrid delivery, with all online on-demand sessions available as of June 10.

Take advantage of our early bird rates and register by **March 22 at 11:59 PM ET** for \$100 off applicable registration types.

[Details & Registration](#)

2024-25 Membership Renewals

It's time to renew your STEP membership!

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 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.

Membership renewals are due by April 1, 2024.

[Login Today to Renew Your Membership](#)



19th Annual
**STEP PRIVATE
CLIENT
Awards**

ENTRIES NOW OPEN!
Entry deadline: April 12, 2024

Showcase your excellence
to your peers and clients

ENTER NOW

Entries for the 19th Annual STEP Private Client Awards are now open!

Seen as the hallmark of quality within the private client industry, the Awards are open to both STEP members and non-members and entries are encouraged from all over the world. Canadians are encouraged to apply as these prestigious Awards recognize and celebrate excellence among our private client solicitors, lawyers, accountants, barristers, bankers, trust manager and financial advisors.

[Details](#)

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**.

There will be limited capacity for this event.

Watch step.ca for more information to be released in the next few weeks.

The Oxford Handbook of Comparative Trust Laws: The Conference

Sponsored by STEP Canada

Friday, April 5 - Sunday, April 7, 2024
Vancouver, BC

The Conference will bring together most of the world's leading trust law academics to discuss key topics in the current law of trusts. It is one stage in the process of producing the forthcoming Oxford Handbook of Comparative Trust Laws, edited by Richard Nolan (York Law School, UK), Lusina Ho (Hong Kong University), Mark Bennett (Victoria University of Wellington, New Zealand) and Adam Hofri-Winogradow (Allard Law, UBC), and under contract with Oxford University Press. Each presentation will focus on a doctrinal, practical or theoretical topic, as dealt with under the laws of more than 30 countries around the world.

In-person and virtual attendance options are available.



[Details & Registration](#)

eNews Update

From the STEP Canada Public Policy Committee

RE: Bill C-42, Canada Business Corporations Act amendments
(Public disclosure of the beneficial ownership register)

[View the Submission](#)

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.

[Regional Director - Scotiabank \(Greater Toronto Area\)](#)

[Estate Planning Lawyer - IG Financial Planning \(Any Canadian Common Law Jurisdiction\)](#)

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	June 10, 2024	May 10, 2024
STEP Canada Diploma Program	May 27, 2024	Registration Closed
	November 4, 2024	September 1, 2024
Essay Submission	May 1, 2024	

Updates

Diploma Program

Students are reminded to register for their course Mentorship Circle sessions and Instructor Tutorials. The registration links along with the case studies & questions that will be discussed at the sessions can be found in the course website.

Law of Trusts Students

Course assignments are due March 24, 2024 by 11:59pm EST. Students who have deferred their exam to November do not have to complete the assignment for this current term.

Taxation of Trusts and Estates Students

Assessment 2 is due by April 12, 2024 by 5:00pm EST. Students who have deferred their exam to November do not have to complete the assignment for this current term.

Trust and Estate Planning Students

Course assignment 1 is due March 15, 2024 by 11:59pm EST. Students who have deferred their exam to November do not have to complete the assignment for this current term.

** note that the above assignments are not applicable to the French Diploma students*

Connect With Us on LinkedIn

Check out our latest LinkedIn post:



UPDATE: The time and location of our presentation has changed and will now take place from 12:00 PM - 1:30 PM ET in The Law Building, Room 211.

We are excited to connect with the law school students of Queen's University by presenting a glimpse into the captivating world of trusts and estates and the array of dynamic opportunities available in this unique industry.

STEP member Sunita D. Doobay J.D., LL.M. (U.S. Tax), TEP, AEP® will be presenting "Death, Taxes, and the Executor – A Day in the Life of a TEP Practitioner", and will be joined by special guests, Rachel Blumenfeld, Chair of STEP Canada, and Michael Dodick, Chief Operating Officer of STEP Canada.

#STEP #STEPCanada #QueensUniversity #LawSchool #TEP #trustsandestates

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](#)

Upcoming Branch & Chapter Events

STEP Ottawa
Branch Bundle Seminar & Special Branch Meeting
March 20, 2024
3:00pm - 5:00pm ET
Le Germain Hotel, Ottawa

STEP Atlantic
Branch Bundle Seminar
March 21, 2024
2:30pm - 4:30pm AT
Stewart McKelvey offices across the Atlantic Provinces

STEP Montreal
Branch Bundle Seminar
March 21, 2024
12:00pm - 2:00pm ET
Borden Ladner Gervais LLP,
Montreal

STEP Vancouver
Student Networking Event
April 4, 2024
12:30pm - 2:30pm PT
KPMG LLP, Vancouver

STEP Vancouver
Branch Bundle Seminar
April 4, 2024
3:00pm - 5:00pm PT
UBC Robson Square, Vancouver

STEP Toronto
STEPping out to Lunch
April 18, 2024
11:45am - 1:00pm ET
Aird & Berlis LLP, Toronto

STEP Calgary
Branch Bundle Seminar
April 10, 2024
7:30am - 9:30pm MT
Calgary Petroleum Club, Calgary

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](#)