

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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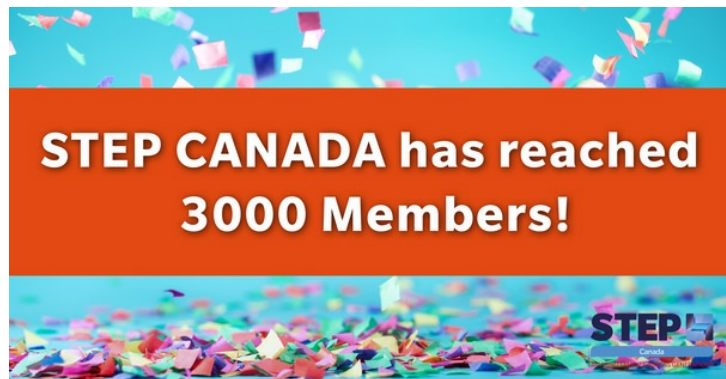
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STEP Canada's membership roll has reached 3000 members - we could not have done this without you!

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.

STEP Canada 2020/Coronavirus Update - March 10, 2020

The health, safety and wellbeing of our volunteers, members, event delegates, sponsors, employees and their families is of utmost concern to STEP Canada.

STEP Canada has been closely monitoring and will continue to monitor COVID-19 announcements and updates from the Public Health Agency of Canada (PHAC). The PHAC is a reliable source of information, as are provincial and territorial public health

authorities.

<https://www.canada.ca/en/public-health/services/diseases/2019-novel-coronavirus-infection/latest-travel-health-advice.html>

STEP Canada will take its guidance from the PHAC and other key agencies regarding STEP Canada events and gatherings taking place over the coming weeks, including the national conference. At this time, PHAC has assessed the public health risk associated with COVID-19 as **low** for the general population.

22nd National Conference

As of today, we are working towards the 22nd national conference taking place on the originally scheduled dates of June 11-12, 2020, in Toronto.

Branch and Chapter Events

Local branch and chapters events will be reviewed on an individual basis after consultation among STEP Canada executives, senior management and local executive committees.

Ongoing Assessment

We will continue to monitor the situation, which is rapidly evolving, and assess our plans accordingly. We will provide regular updates to our stakeholders. Once again, the health, safety and wellbeing of our volunteers, members, event delegates, sponsors, employees and their families is and will remain our top priority.

We are very hopeful you all remain well and that we can look forward to seeing you at upcoming events, including the national conference in June.

STEP Canada

STEP Canada 22nd National Conference 2020

Conference Hotel - Filling Up Fast!

InterContinental Toronto Centre

225 Front St W

Toronto, ON Canada

Phone: (416) 597-1400

Toll-free: 1-877-660-8550 (Canada and US)

View the hotel website by clicking [here](#)

Reservation link [here](#)

Nightly Rate: \$287.00 (plus applicable taxes)

per single or double occupancy

RATES AND ROOMS ARE BASED ON AVAILABILITY

If reserving by phone, please specify **STEP Canada 2020** when booking to receive the preferred rate. Rooms are being held (based on availability) until **Friday, May 8, 2020**.

Register Today!

2020 will mark STEP Canada's 22nd National Conference, featuring a number of sought-after speakers who will discuss the latest trends and developments in wealth management.

"It's the combination of technical information plus great opportunities to network that makes the STEP Canada Conference stand out"



View the **full program** with expert speakers and insightful sessions!

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 recognise 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](#). The deadline for submissions is **April 30, 2020**.



Saskatchewan 5th Anniversary Celebration

STEP Canada's Saskatchewan Chapter celebrated its 5th Anniversary on January 13, 2020. Held at the Saskatoon Club, the lively evening featured guest speaker Jamie Golombek of CIBC, a special anniversary cake, balloons and giveaways!

Jamie Golombek's informative and engaging presentation "Tax Updates and Planning for 2020" was a highlight of the night, providing a thorough and entertaining overview of the year ahead.

Congratulations to the STEP Saskatchewan Chapter!



CAREER CENTRE

Seeking new professional ventures? STEP Canada is proud to offer a Practitioner Opportunity service as a great resource for connecting the highest calibre of trust and estate practitioners to employers.

Senior Trust Officer - Scotiabank,
Calgary, AB

Regional Trust Officer - RBC Wealth



Management, Saskatoon, SK

Regional Trust Officer - MD Financial
Management, Vancouver, BC

[More on Practitioner Opportunity](#)
[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 (English & French)	June 1, 2020 September 8, 2020	<i>Registration Closed</i> May 1, 2020 August 8, 2020
STEP Diploma Program (English & French)	May 25, 2020 November 2, 2020	April 25, 2020 October 2, 2020
Essay Submission	May 1, 2020 October 1, 2020	-

**It is recommended that you register in advance of this deadline to ensure sufficient preparation time.*

New Resources!

The CETA and STEP Canada Diploma Program have new resources available in the course websites. Each course in these programs have a practice case study that is attached to a ProctorU system test. This new resource will allow students the opportunity to review the types of case study questions asked on examinations while becoming familiar with the electronic testing environment. These case studies are not marked; students should review their practice quiz and assess how their answers reflect the suggested answers.

[For more information please contact Education](#)

**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 team

[Contact Education](#)

BRANCH EVENT CENTRE

We are pleased to be able to offer a glimpse of our 2019-20 Education Seminars & Events.
Please see hyperlinks below for additional information.

Tues March 17	Winnipeg Branch <i>Separation or Death: Family Property Division and Related Planning</i>	Wed April 22	Toronto Branch <i>Planning, Drafting and Administration Challenges for Unique Assets</i>
Thurs March 19	Edmonton Branch <i>Tax Planning for Farm Families</i>	Wed May 20	Toronto Branch <i>Family Enterprise Succession Planning - Coaching Families to Avoid Disasters & Annual Branch Meeting</i>
Thurs March 26	Calgary Branch <i>Offshore Trust and Estate - Case Studies to Identify Issues and Planning Ideas</i>	Wed May 27	Saskatchewan Chapter <i>Ethical Dilemmas: A Multi-disciplinary Approach & Annual Chapter Meeting</i>
Tues April 21	Calgary Branch <i>Philanthropic Planning</i>	June 11, 12	National <i>STEP Canada 22nd National Conference</i>

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