

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!

CONTENTS:

STEP Canada's TOSI Guide

New Resources for Members

Membership Renewals

22nd National Conference

2020 Speakers' Series

STEP Canada's AGM

STEP Private Client Awards

Career Centre

Education Centre

Branch Event Centre

Reminders

Contact Us

**STEP Canada's TOSI Guide
2nd Edition - April 2020**



STEP Canada is pleased to provide to its valued members an updated consolidated second edition in electronic format of the *STEP Canada Guide to the Tax on Split Income (TOSI) Rules*.

STEP Canada members can access the new edition in their My STEP Canada Portal under the resources tab, after logging in to step.ca.

More information can be found [here](#).

New Resources for Members

**Executing Estate Documents in Canada in 2020:
Covid-19 Amendments and How to Effect Safe (And Valid) Signings**

*From the STEP Canada Trust & Estate Technical Committee
UPDATED May 13, 2020*

STEP Canada has prepared a resources chart for its members to reference the options for having documents signed in each province and territory. Members can access the most current version of this resource in their My STEP Canada Portal under the resource tab, after logging in to step.ca.

National Conference Archived Material

We are happy to share with STEP members some planning tips that were provided at our National Conference during the last major market economic downturn that occurred with the 2008 Financial Crisis. Please use the links below to access the power point presentations from the Tax Planning in Difficult Economic Times session at the 2009 National Conference:

Loss Utilization Strategies by Greg Lindsey of Newland Lindsey LLP

Implementing or Altering an Estate Freeze and Low-Interest Loan Planning by William Fowlis of Miller Thomson LLP

New Public-Facing Website: <https://advisingfamilies.org/canada/>

From the STEP Canada Member Services Committee

The new website provides information to help families plan for their futures. Members, please consider sharing this website with your clients, it is a useful tool for providing clarity about these complex issues.

Membership Renewals

The 2020-2021 membership renewal campaign began in early March. As a reminder, all STEP members were required to remit their membership fees and sign the annual declaration by April 1, 2020, however, in light of current events we are allowing a grace period up until **June 30, 2020** before suspending members who are not in good standing.

To retain your membership status, please complete the declaration and submit payment through the STEP Canada website, [here](#).

Need help? Contact our Member Services team at memberservices@step.ca.

CANCELLED - 22nd National Conference

On May 13, 2020 STEP Canada officially announced the cancellation of the 22nd National Conference. The health and safety of our speakers, delegates, sponsors, and staff and their families is the primary concern to STEP. We thank you for your patience and continued support.

STEP Canada supports its members and stakeholders

In accordance with our previous announcements, all delegate and sponsors will automatically receive a full refund of fees paid to STEP for the 2020 conference. These refunds will be processed by the end of May.



2020 Speakers' Series

STEP Professional Development Opportunities Continue into Fall 2020

STEP Canada will remain the leading educational body for professionals in the trust and estate industry with the rollout of the STEP Canada 2020 Speakers' Series!

Virtually all speakers who originally agreed to present topics at the 2020 Conference have agreed to participate in the new Speakers' Series. We are extremely grateful to have the support of these talented practitioners willing to share their expertise. Drawing on the excellent program, STEP will be professionally

recording the presentations and panelists over the next few months. In the fall, STEP will broadcast sessions each Tuesday and Thursday at 12 noon ET. These sessions will replicate the conference program by providing delegate chat and question functions. During and immediately after each streamed session, delegates can post comments and speakers will be available in the adjoining 'chat room' to take questions.

The 2020 Conference app will be adapted to become the 2020 Speakers' Series App. As the sessions are broadcast, an archived copy plus a copy of the chat room discussion and Q&As will be accessible through the app.

Registration details and fees for the STEP Canada 2020 Speakers' Series will be available shortly.

Accredited CPD for Delegates

As a further benefit, STEP has already secured accreditation for the conference from many professional associations. We have confirmed the accreditation will carry over to the online Speakers' Series.

To be Announced as We Look Forward

Watch for further communication about:

Dates for the STEP Canada 2020 Speakers' Series

Delegate registration details and fees

Sponsorship opportunities

And so much more we don't even know we don't know yet!

STEP Canada's AGM

STEP Canada's Annual General Meeting will be held on June 10, 2020. STEP will be utilizing a Zoom platform that has enhanced security features to protect our members.

An official notice of meeting with instructions on how to register will be emailed to members on May 15, 2020.

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 recognize 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 have been extended until **June 26, 2020**.



Career Centre

Seeking new professional ventures? 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.

Executive Trust Officer - TD Private Trust, Kelowna, 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	May 1, 2020 August 8, 2020
STEP Diploma Program (English & French)	May 25, 2020 August 3, 2020 ** November 2, 2020	October 2, 2020
Essay Submission	October 1, 2020	-

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

***A makeup session is being offered on August 3rd, 2020. Please review the updated statement [here](#).*

Notice from the Education Team

Examinations are scheduled as planned for our CETA and Diploma courses. A makeup exam session for the diploma courses will be offered on August 3, 2020. Provisional registration into the next course is recommended for students that plan to take two exams this year and are completing their first exam in August. Affiliates/Associates should refer to the updated COVID-19 Exam Notice that is posted on the course website for detailed information and instructions on how to request an exam transfer and/or provisional registration. Questions concerning the current COVID-19 situation and the examinations should be directed to the Education Manager at aedwards@step.ca.

**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

[Contact Education](#)

Branch Event Centre

CANCELLED - Branch and Chapter Events March 18 through December 2020

STEP Canada's executive committee has determined it is in the best interest of STEP Canada to cancel all STEP branch and chapter events from now until the end of December 2020. This decision was not taken lightly and was supported by the board of directors. Refunds for registration fees paid have been processed.

We are very hopeful you all remain well and that we can look forward to seeing you, in some way, at future events.

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.

STEP Canada is actively investigating other options for delivering the valued technical content to our members. In the meantime, we will be looking back to some of our best conference panels from previous years (as rated by delegates) and sharing the presentations with our members.

[RETURN TO TOP](#)

[Got Questions? Please Contact Us | Phone: 416-491-4949 ext.221 | Toll-free: 1-877-991-4949 | step.ca](#)

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