

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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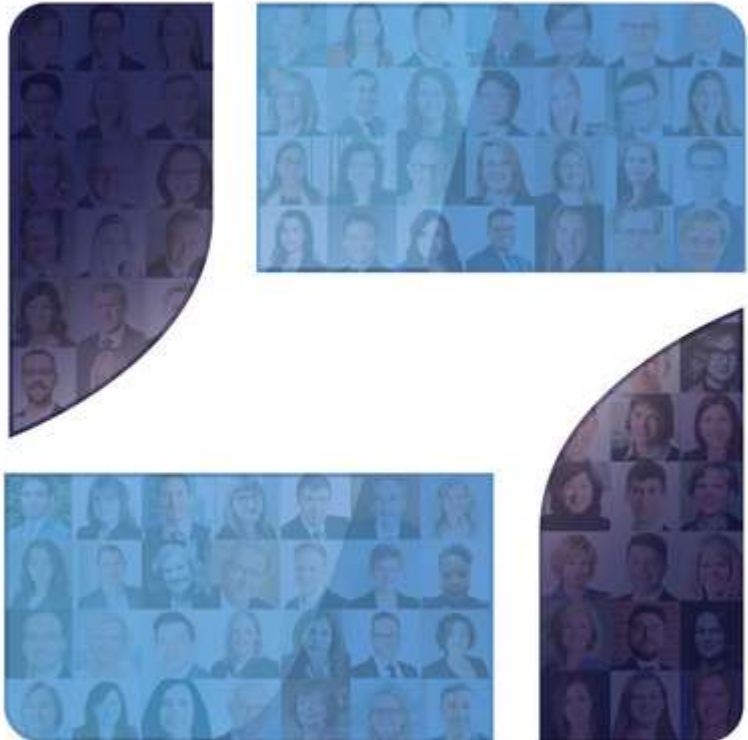
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National Volunteer Week (April 24-30, 2022)

Thank you!

STEP Canada would like to thank the hundreds of dedicated individuals who volunteer their time and expertise to this organization, and the trust and estate industry.

Without your support, STEP Canada would not be able to continue its successful growth and evolution.

2022-23 Membership Renewals

If you have not yet renewed your annual membership, this is a friendly reminder to submit payment at your earliest convenience. All STEP Canada membership renewals were due **April 1, 2022**.

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.

STEP Canada is pleased to offer its members in good standing preferred registration rates to the 24th National Conference, June 15th-17th, 2022. Be sure you renew your membership prior to registering to be eligible for the discounted rates.

[Click here to sign in](#)

New Member Banners on LinkedIn

STEP is thrilled to launch a new member benefit!

Members will now be sent an image (shown below) applicable to their membership type which they can then share* on LinkedIn to promote their accomplishment when they move into a new membership category.

Members who have moved into a new category within the last 5 months will already have received an email from STEPs Marketing team with a copy of their applicable image, and new members will receive them in their welcome email moving forward.

We encourage all members to keep an eye out for these images on LinkedIn, and offer your congratulations to all our fellow members working to earn the TEP designation!



**applicable rules and guidelines must be followed*

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).

[Details and Registration](#)

Latest STEP Canada eNews

April 21, 2022

RE: Alberta Law Reform Institute: Report of Electronic Wills

[Click here for more information](#)

April 13, 2022

RE: Budget 2022

[Click here for more information](#)

April 6, 2022

RE: STEP Canada Submission to Department of Finance on Notifiable Transactions

[Click here for more information](#)

April 5, 2022

RE: STEP Canada Submission to Department of Finance on Reporting Requirements for Trusts

[Click here for more information](#)

Searchable Resource Tool (SRT)

Have you checked out STEP Canada's **new** Searchable Resource Tool?

As a member, you now have access to a library of STEP Canada content including a collection of presentation decks, formal papers, additional resources, and articles from Branch & Chapter Events, National Conferences and Webcasts, and the STEP Inside newsletter.

[Access the STEP Canada SRT today by logging in to your MY STEP account.](#)



STEP Global Congress 2022

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

This event offers delegates the opportunity to hear from speakers at the forefront of their profession and network with some of the world's leading advisors. As an attendee, delegates will not only have the chance to see the future direction of STEP, but will also be able to help steer the campaigns that STEP will be launching for the coming decade and ensure its position as the pre-eminent worldwide professional association for those advising families across generations.

[Details and Registration](#)

17th Annual Private Client Awards

STEP is thrilled to announce that 337 entries were received from 27 countries, a record number of submissions for the Private Client Awards.

Thank you and good luck to all Canadians that entered. The finalists will be released in June, and the winners will be announced at the Awards Ceremony, taking place in London, UK on September 14th, 2022.

[Details and registration](#)

2022-23 Branch/Chapter Programming

All STEP Canada branches and chapters will once again be offering a Bundle of 6 unique technical seminars for the 2022-23 programming season. This seasons Bundle will follow a hybrid model, with branches/chapters having the option to host their local sessions in-person if government directives allow.

The two National sessions will be broadcast for online viewing only, taking place on **Wednesday, September 14th, 2022 at 12:00 noon ET** and **Thursday, January 19th, 2023 at 12:00 noon ET**.

Stay tuned for more additional details and registration which will be released in early summer.

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**.

Stay tuned for the release of our May 2022 issue coming shortly.



CE/CPD Credits for Past Events

CPD certificates have 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. Another CPD certificate will be sent in July 2022 for all remaining Bundle seminars and National Conference sessions.

Access to all apps including the 2020 Speakers' Series, 2021 Q1 & Q2 Branch Bundles, 2021 National Conference, and 2021-22 Branch Bundles will only be available until December 31, 2022.

Updated Discover Brochure

Did you know?

STEP represents over 22,000 members Worldwide and over 3,250 members in Canada, and is the leading international organization for trust and estate professionals who specialize in family inheritance and succession planning. The TEP designation is an internationally recognized hallmark of professional expertise, and we are always welcoming new qualifying to join!

If you have a colleague you think would be interested in, or benefit from STEP membership, you can share [this updated brochure](#) with them and invite them to contact our Member Services team at memberservices@step.ca for more information on how to join.

You can find more information on our website, [here](#).



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.

Director, Tax & Estate Planning - IG Wealth Management (Atlantic Provinces, Ontario, Western Canada)

Gestionnaire fiduciaire - Desjardin (Montreal, Quebec)

High Net Worth Planner - TD Wealth (Calgary, Alberta)

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 September 1, 2022	May 1, 2022 August 1, 2022
STEP Canada Diploma Program	May 30, 2022 November 7, 2022	Registration Closed September 7, 2022
Essay Submission	May 1, 2022 October 1, 2022	*2022 topics can be found here

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.

Diploma Program

A recording of the exam-administration webinar that reviews the updated exam experience and procedures is posted inside the course websites.

Diploma Fee Increase Notice: STEP Canada is committed to providing exceptional value for to our students; our fees have consistently reflected this commitment. STEP Canada has not increased course fees since January 2019. As of August 1, 2022, the new course fee will be \$995. Our course fees continue to be all-inclusive (course material, study resources, and examination). This increase will be invested back into our student programming so that we can continue to enhance our educational services. Any questions can be sent to our Education team at education@step.ca.

Upcoming Branch & Chapter Events

**Click the branch to view details and registration for each event*

Tues May 10	STEP Okanagan Annual Chapter Meeting 2:00pm - 2:15pm PT Zoom	Wed May 11	STEP Ottawa Annual Branch Meeting & TEP Talk 4:45pm - 6:00pm ET Zoom
Thur May 12	STEP Atlantic Annual Branch Meeting & Sparkling Reception 5:00pm - 7:30pm AT In-Person, Cox & Palmer, Halifax	Thur May 12	STEP Winnipeg Annual Branch Meeting 8:30am - 8:45am CT Zoom
Thur May 12	STEP Edmonton Annual Branch Meeting & 20th Anniversary 4:00pm - 6:30pm MT In-Person, Manulife Place, Edmonton	Tues May 17	STEP Vancouver Annual Branch Meeting & Social Event 3:30pm - 6:30pm PT In-Person, Shaughnessy Restaurant, Vancouver
Weds May 18	STEP Toronto Annual Branch Meeting 2:30pm - 2:45pm ET Zoom	Thur May 19	STEP Montreal Annual Branch Meeting 3:30pm - 3:45pm ET Zoom
Tues May 24	STEP Southwestern Ontario Annual Chapter Meeting 3:30pm - 3:45pm ET Zoom	Weds May 25	STEP Saskatchewan Annual Chapter Meeting 2:30pm - 2:45pm CT Zoom
Mon June 13	STEP Canada Annual General Meeting 12:15pm - 12:30pm ET Dial-In		

[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 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

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