

E-Newsletter Vol. 12 | Issue 5 | May 14, 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!

2024 Federal Budget Webcast

What Every STEP Advisor Needs to Know

On Monday, May 13th, our distinguished panel presented an important overview of the 2024 Federal Budget and the ways it will impact STEP members. If you missed the webcast and would still like to take advantage of the valuable information, you can register below to view the archived broadcast. Registration is complimentary for STEP members.

PANELISTS



Ian Lebane
LLB, LLM, TEP,
Toronto: TD Wealth;
Chair, STEP Canada Tax
Technical Committee



Yogesh Bhatthella
CPA, CGA, CFP, TEP,
Vancouver:
KPMG LLP



Kenneth Keung
CPA, CA, CPA (CO,
USA), LLB, CFP, MTAX,
TEP, Calgary: Moodys
Private Client



Ian Pryor
LLB, TEP, Ottawa:
Pryor Tax Law

Six weeks and counting... Budget 2024: what to do (or not do) before June 25

The 2024 Budget proposes to increase capital gains inclusion rate to 2/3 and the lifetime capital gain exemption to \$1,250,000, effective for dispositions on or after June 25, 2024. This webinar will focus on some considerations that advisors and their clients may want to ponder between now and June 25, 2024 to prepare for these proposed changes. For example:

- What are the pros and cons of accelerating the realization of capital gains before June 25, 2024?
- How do these proposed changes impact trusts and planning involving trusts?
- If the client wants to crystallize accrued personal or corporate capital gains, how to implement it?
- How will this impact currently ongoing estate and post-mortem planning?
- What impact will this have on emigration planning?
- And more!

[Details & Registration](#)

2024-25 Membership Renewals

Reminder - It's Time to Renew Your STEP Membership

If you haven't already done so, please log in to your MY STEP account via the link below to process your 2024-25 membership renewal that was due April 1st, 2024.

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 access to the recently held 2024 Federal Budget Webcast, 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.

Failure to renew will result in the suspension of your membership and revocation of your membership benefits.

[Login Today to Renew Your Membership](#)

26th Annual National Conference



BUILDING CONNECTIONS, SHARING KNOWLEDGE

In less than 3 weeks, hundreds of delegates will come together for STEP Canada's 26th National Conference, which will feature a robust program lineup and ample opportunities to connect and network with STEP members and practitioners.

We hope you'll join us for two unique days of building new connections, sharing your knowledge through timely discussions, and taking in practical and engaging topics through our plenary and concurrent sessions.

SPEAKER LINE UP

The list of outstanding panelists who will be leading the Conference program has been published! Check out who you'll be listening to by exploring the [program schedule](#) today.

MONDAY NIGHT INTERACTIVE COCKTAIL PARTY

Enjoy the company of friends and colleagues in a state-of-the-art venue at a NEW style of STEP Canada social event. Mingle at different food and drink stations and marvel at unique performances by local artists. Please note there are very few tickets left for this special event!

We are quickly approaching our in-person event capacity and will not have onsite registration available. Register today to secure your spot.

[Details & Registration](#)

National Volunteer Week

For National Volunteer Week, April 14th to 20th, 2024, STEP Canada was proud to acknowledge the hundreds of dedicated individuals who generously contribute their time and expertise to the STEP community, and to the dynamic and rewarding industry of trusts and estates.

Our incredible volunteers, both locally and nationally, are instrumental in supporting STEP Canada's initiatives and fulfilling its goals and mandate. This exceptional group of professionals play a vital role in the growth and success of STEP, and their unwavering commitment continues to drive STEP Canada forward.

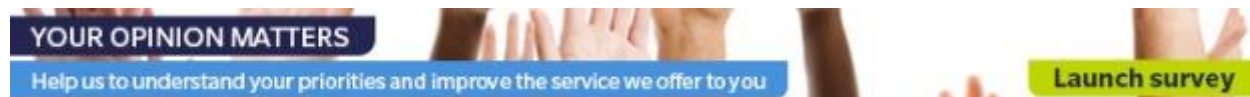


NATIONAL VOLUNTEER WEEK

With a deep appreciation for their vision and leadership, we would like to extend a heartfelt thank you to our Board of Directors.

[View our 2023-24 Board of Directors](#)

Your Opinion Matters



STEP wants to ensure you get the very best member experience possible. With this in mind, we would be grateful if you could provide your feedback by completing a survey. The results will help STEP understand your priorities and focus our offering, so that we can continually improve the services provided to you.

The survey will close on May 24, 2024 at 11:59pm GMT. Please email marketing@step.org with any questions or feedback related to the survey.

[Take Survey](#)

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 after STEP Canada's National Conference.

eNews

eNews - May 13, 2024

From the STEP Canada Public Policy Committee

RE: Federal Budget 2024 - Capital Gains Inclusion Rate

[View the Announcement](#)

Sources for CPD/CE Credits



CPD is a requirement for maintaining STEP membership for all membership types that are currently working.

Did you know that reading the STEP Journal and STEP Inside also count towards STEP's CPD requirement?

[View STEP's CPD Policy](#)

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, Senior Trust Officer - BMO Financial Group - Waterloo, ON](#)

[Executive Trust Officer - TD Wealth Private Trust - Vancouver, BC](#)

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 September 4, 2024 | May 10, 2024 August 4, 2024 |
| STEP Canada Diploma Program All Courses | November 4, 2024 | September 1, 2024 |
| Essay Submission | October 1, 2024 | |

Updates

Diploma & CETA (2-4) Programs – Upcoming Exams

Exam Procedures:

Detailed instructions, including print and video step-by-step guides on how to take the examination and system demos, are posted to the classrooms. Students are encouraged to review documentation prior to the exam to ensure preparation for exam day.

Exam credentials will be emailed by May 15th (Diploma students) and May 30th (CETA 2-4 students).

Good luck to all of the students writing upcoming exams.

Connect With Us on LinkedIn

Check out our latest LinkedIn post:



Our 26th National Conference is less than one month away, and we can hardly contain our excitement!

We hope you'll join us for two unique days of building new connections, sharing your knowledge through timely discussions, and taking in practical and engaging topics through our plenary and concurrent sessions. Our aim is to provide practitioners from all disciplines with information that will elevate your professional expertise.

We are quickly approaching our in-person capacity – secure your spot today before it's too late!

For more details and to register, click here -> <https://cvent.me/axxr93?RefId=LinkedIn>

[#STEP](#) [#STEPCanada](#) [#STEPCanConferences](#) [#TEP](#) [#Education](#) [#Networking](#)

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 Events

STEP Atlantic

[Branch Bundle Seminar](#)

May 16, 2024
2:30pm - 4:30pm AT
Stewart McKelvey Offices
across Atlantic Provinces

STEP Atlantic

[ABM + Sparkling Reception](#)
May 16, 2024
5:00pm - 7:00pm AT
Cox & Palmer, Halifax

STEP Edmonton

[ABM + Branch Bundle Seminar](#)
May 16, 2024
4:00pm - 6:00pm MT
Manulife Place, Third
Floor, Edmonton

STEP Southwestern Ontario

[ACM + Chapter Bundle Seminar](#)
May 21, 2024
4:00pm - 6:00pm ET
KPMG Offices in London,
Kitchener & Waterloo

STEP Okanagan

[ACM + Chapter Bundle Seminar](#)
May 21, 2024
3:00pm - 5:00pm PT
BMO Private Wealth,
Kelowna

STEP Montreal

[Seminar Showcase + Cocktail Reception](#)
May 21, 2024
4:00pm - 7:00pm ET
RBC Private Suites,
Montreal

STEP Ottawa

[ABM + Branch Bundle Seminar](#)
May 22, 2024
3:00pm - 5:00pm ET
Le Germain Hotel Ottawa,
Ottawa

STEP Vancouver

[ABM + Branch Bundle Seminar](#)
May 23, 2024
3:00pm - 5:00pm PT
UBC Robson Square,
Vancouver

STEP Winnipeg

[ABM + Branch Bundle Seminar](#)
May 28, 2024
12:00pm - 2:00pm CT
Del Crewson Conference
Centre, Winnipeg

STEP Saskatchewan

[Chapter Bundle Seminar](#)
May 28, 2024
3:00pm - 5:00pm CST
Saskatoon Club,
Saskatoon

STEP Calgary

[Branch Bundle Seminar](#)
May 28, 2024
7:30am - 9:30pm MT
Calgary Petroleum Club,
Calgary

STEP Canada

[Annual General Meeting](#)
May 30, 2024
1:00pm - 1:30pm ET
Zoom

STEP Canada

[National Conference](#)
June 3-4, 2024
Sheraton Centre Toronto
Hotel, Toronto

STEP Winnipeg

[TEP Talk](#)
June 5, 2024
11:55am - 1:00pm CT
Zoom

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](#)

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