



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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## STEP's Special Interest Groups' Spotlight Sessions



STEP's seven **Special Interest Groups** will each host a 1.5 hour webinar across a two week period covering specialist topics. Hear from leading industry experts on thought-provoking topics and stay up to date with industry developments from the comfort of your own home.

Registration is open to SIG members, STEP members, and non-members. All webinars will take place from 4:00pm - 5:30pm GMT. Each webinar qualifies for 1.5 hours of CPD.

### **Can't attend live? Not to worry!**

Each webinar will be recorded, and all registrants will receive a copy of the archived version to watch on-demand at the conclusion of the event.

[Details and Registration](#)

[FAQ](#)

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## New STEP Worldwide Council Appointment

STEP Canada is pleased to congratulate the Past Chair of our Board of Directors, Pamela Cross, on her new appointment to STEP Worldwide Council. Pamela was elected by Full members of STEP Canada to represent our region globally. She will play an integral part in advising the STEP Board of Directors on aspects of STEP's strategic journey, as well as matters of interest to the wider membership. STEP Council members are the primary channels for communication and representation between members and governance bodies.

Please join us in congratulating Pamela on this new role!

[View all successful 2021 Council members](#)

## Information for the Public



**Did you know that STEP has a website full of information and resources aimed at the general public?**

This website houses an information portal that can provide clarity about many complex issues for families, such as how to properly manage different types of assets, foreign affairs, and what happens after death. The website also explains what a TEP is, why families should choose one, and a directory to search for a STEP member.

We encourage members to share this valuable resource with their clients.

**[Visit the Advising Families website](#)**

## 2021 Virtual STEP Branch Chairs Assembly

On Tuesday, November 2nd, all Branch Chairs across the globe met together with STEP leadership for the annual Branch Chairs Assembly.

This productive day included small group sessions where Branch Chairs could share their 2020-2021 success stories and their ideas for how to align with STEP's new values - community, collaboration, integrity, and continuous learning. Also discussed were plans and action items for the 2020-2025 Strategy, managing virtual events, thought leadership campaigns, member survey results, and more.

Thank you to the STEP Canada Branch Chairs for their active participation.

## 2021 Financial Planning Week

STEP Canada is pleased to once again be sponsoring FP Canada's Financial Planning Conference from November 23-25th, 2021.

During the three-day virtual conference, STEP Canada will have an exhibit booth that showcases benefits of our membership, education programs, and the TEP designation. The event is expected to bring in over 1,000 financial planners, industry leaders, regulators, educators, and student delegates from across the industry.

If you are attending the conference, please stop by the booth and say 'hello' to the STEP Canada National Staff that will be manning the chat boxes!

## 2021-22 Branch/Chapter Bundles

**Haven't registered yet? Don't miss out!**

Join over 700 delegates from across the country that are already registered and enjoying the 2021-22 Branch/Chapter Bundles! Registrants to the Bundles will benefit by learning from specialized speakers covering relevant topics at both the local level and across Canada, flexible viewing schedules with both live and on-demand options, and CE/CPD hours to support continuing education.

As a bonus, members of STEP Canada can also receive a discount on their second Branch/Chapter Bundle registration (Bundle Plus), after the purchase of their 'home' Branch/Chapter Bundle!

**[Details and Registration](#)**

## CE/CPD Credits for Past Events

The Member Services team sends supplementary CE/CPD credit certificates monthly for the 2021 Q1 & Q2 Branch Bundle and the 23rd National Conference.

If you have not yet viewed the sessions or completed the quizzes for either event, the archived broadcasts remain available on the app for your viewing. Please contact **Member Services** if you have questions about your CE/CPD credit certificates.

Don't forget - registration is still open for both events if you require CE/CPD credits!

**[Details and registration for the 2021 Q1 & Q2 Branch Bundle](#)**

**[Details and registration for the 23rd National Conference](#)**

## 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.

**Senior Tax Manager - TD Private Wealth Management (Vancouver, BC)**

**Estate and Trust Advisor - MD Financial Management (Markham, ON)**

**Executive Trust Officer - TD Wealth (Montreal, QC)**

**Estates Lawyer - Rogerson Law Group (Toronto/Barrie, ON)**

**Regional Trust Officer - MD Financial Management (Vancouver, BC)**

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	March 1, 2022 June 1, 2022	February 1, 2022 May 1, 2022
STEP Canada Diploma Program	May 30, 2022 November 7, 2022	April 30, 2022 October 7, 2022
Essay Submission	May 1, 2022 October 1, 2022	<b>*2022 topics can be found <a href="#">here</a></b>

# Upcoming Branch & Chapter Events

*\*Save the date - registration coming soon*

Mon Nov 15	<b>STEP Calgary</b> Student TEP Talk 12:00 noon - 1:00 pm MT Zoom	Wed Nov 10	<b>STEP Ottawa</b> TEP Talk 4:45 pm - 5:45 pm ET Zoom
Wed Dec 1	<b>STEP Winnipeg</b> *TEP Talk 12:00 noon - 1:00 pm CT Zoom	Tues Dec 7	<b>STEP Southwestern Ontario</b> *TEP Talk 12:00 noon - 1:00 pm ET Zoom

[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](mailto: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.

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

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