

E-Newsletter Vol. 11 | Issue 11 | November 14, 2023

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!



On Thursday, September 21st, STEP announced the winners of the 18th Annual Private Client Awards at a ceremony in London. These awards set the standard for excellence in private client practice, and are open to lawyers, accountants, private bankers, financial advisors and trust managers worldwide.

Congratulations to the Canadian winner, **TD Wealth Private Trust, Tax Services**, for winning the award for **Accountancy Team of the Year (midsize firm)**.

This year saw a record 343 submissions from 29 countries.

In the photo: Jennifer Tokarek, Susan Mabley, and Tony Pitcher (presenter)

[View All 2023 Winners](#)

Save the Date: 26th Annual National Conference

Mark the date in your calendar!

Planning is underway for STEP Canada's 26th Annual National Conference, and we hope to see you in June 2024 taking advantage of great technical sessions, networking, and much more.

Monday, June 3 & Tuesday, June 4, 2024
in Toronto at the Sheraton Centre Toronto Hotel

Monday, June 10, 2024
On-Demand Replays

Watch step.ca for more information to be released in the next few weeks.



2023-24
**BRANCH/CHAPTER
BUNDLES**



"...In this constantly changing legal landscape there's no better way to stay on top of it all than to get together with the local STEP community to listen, question, share, and learn."

Our branches and chapters have an exciting lineup of unique and timely technical seminars for the 2023-24 education season! We remain committed to creating opportunities for our members to expand their knowledge and professional networks.

BEST VALUE: Take advantage of six seminars worth of in-depth content, valuable collaboration, networking opportunities, and accessible continuing education (CPD/CE) credits by registering for a **2023-24 Hybrid Branch/Chapter Bundle**.

Our members and delegates have the option of (A) attending seminars live in person or (B) viewing the seminar replays from the comfort of your home or office three business days later. Those who attend in person can interact with speakers during a live Q&A following the technical presentation. This Q&A will be recorded and available as part of the on-demand service.

In addition to the four local seminars, STEP Canada will offer two national seminars covering essential topics to all practitioners in January and February, which will be broadcast online to all Branch & Chapter Bundle delegates nationwide.

As an alternative to a Bundle, STEP Canada is pleased to offer our delegates the ability to select individual seminars (not applicable to online national seminars). Registration to individual seminars allows for in-person attendance only and does not provide app access or replay viewing.

[Details & Registration](#)

Family Enterprise Advisor

Only the Family Enterprise Advisor (FEA) Program prepares you to be fluent in the complexities and nuances of serving business families.

The **FEA Designation** is the global benchmark in family business advising. Designed for professionals with significant technical knowledge, taking the FEA Program will enhance your ability to serve your family enterprise clients. In the crowded field of family enterprise advising, there is one sure way to stand out: the FEA Designation.

In 2024, we will be offering you three opportunities to become "fluent in family enterprise". The FEA Program will now feature a blend of virtual and in-person delivery in several exciting locations across Canada! Connection and convenience in one executive education experience. Register for the 2023 FEA Program today! **STEP Members receive a 10% discount.**



"For almost 20 years, I have been practicing tax and estate planning law and consider myself to be a trusted advisor to my clients. My clients are predominantly owner managed businesses, many of which are enterprising families. It wasn't until taking the FEA Program in 2021 that I realized that being the trusted advisor to a family enterprise means much more than just answering technical legal questions. As an FEA, I can now speak to both the technical aspects of estate planning and ask probing questions that make clients think deeper about the decisions they are making and the lasting impact they will have on the family as a system."

Elise Pulver, LLB, TEP, FEA
Principal, Wealth Planning Lead
TD Wealth Family Office

[Learn More](#)

New Release - October STEP Inside



Jump into the newly released October edition of STEP Inside where we revisit STEP Canada's 25th Annual National Conference! Members can find their digital copy available after logging into their MY STEP account.

STEP Canada would like to express heartfelt appreciation to members of the editorial board, reviewers, National Conference presenters, and authors for sharing their valuable expertise with STEP members across the country.

As always, the editorial committee welcomes article proposals from all members for future editions at news@step.ca.

Don't forget! As a benefit of membership, all members are entitled to receive a hard copy of this valuable resource in addition to the electronic copy. Review and update your subscription preferences in your MY STEP account.

[Access Your MY STEP Account](#)

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.

Current Opportunities:

[Estate and Trust Advisor - MD Financial Management \(Winnipeg, MB\)](#)

Have questions?

[More on Practitioner Opportunities](#)

or

[Post an Opportunity](#)

Education Centre

Education Program	Exam/Essay Date	Registration Deadline
CETA 1	Accessible at anytime	Exams must be completed within 6 months of registering
CETA 2-4	March 4, 2024	February 4, 2024
STEP Canada Diploma Program	May 29, 2024	March 1, 2024
Essay Submission	May 1, 2024	

Updates

Diploma Program

Grades will be released on **December 7, 2023** for those that wrote the November exam. Grades will be posted to MY STEP accounts under “My Courses & Marks”, and an announcement will be posted to the course website once marks are available.

Students who wish to register for the next course prior to receiving their course grade may do a **provisional registration**. The provisional registration form can be found on the course platform under General Forms. The completed form can be emailed to education@step.ca.

Did you hear? STEP Canada is updating the *Taxation of Trusts and Estates* course, which will launch for the Spring 2024 term. The new tax course offers a comprehensive education that lays a strong foundation in tax principles before engaging with the more detailed technical aspects. There will be enhanced learning opportunities such as knowledge checks, practice cases, and a graded assignment to test your understanding. Registration is now open and course materials will be available in January 2024.

Questions regarding this new course should be emailed to education@step.ca.

Connect With Us on LinkedIn

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 Branch & Chapter Events

STEP Toronto

Branch Bundle Seminar
November 15, 2023
3:00pm - 5:00pm ET
Gowling WLG (Canada)
LLP, Toronto

STEP Edmonton

Branch Bundle Seminar
November 16, 2023
4:00pm - 6:00pm MT
Manulife Place, 3rd Floor,
Edmonton

STEP Southwestern Ontario

Chapter Bundle Seminar
November 21, 2023
4:00pm - 6:00pm ET
KPMG LLP, London
(plus satellite locations)

STEP Winnipeg

Branch Bundle Seminar
November 21, 2023
12:00pm - 2:00pm CT
Del Crewson Conference
Centre, Winnipeg

STEP Okanagan

Chapter Bundle Seminar
November 21, 2023
3:00pm - 5:00pm PT
BMO Private Wealth
Office, Kelowna

STEP Ottawa

Branch Bundle Seminar
November 22, 2023
3:00pm - 5:00pm ET
Le Germain Hotel Ottawa,
Ottawa

STEP Calgary

Branch Bundle Seminar
November 23, 2023
7:30am - 9:30am MT
Calgary Petroleum Club,
Calgary

STEP Vancouver

Branch Bundle Seminar
November 23, 2023
3:00pm - 4:00pm PT
UBC Robson Square,
Vancouver

STEP Montreal

Branch Bundle Seminar
November 30, 2023
12:00pm - 2:00pm ET
Borden Ladner Gervais
LLP, Montreal

STEP Atlantic

Branch Bundle Seminar
November 30, 2023
2:30pm - 4:30pm AT
Stewart McKelvey, Halifax
(plus satellite locations)

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 Canada](#)

[STEP Member Directory](#)

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