



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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Voting is Now Open for the Trusted Advisor of the Year



STEP Canada is thrilled to have two Canadian finalists in the 15th Annual STEP Private Client Awards!

Cindy David Financial Group
Boutique Firm of the Year

Carmen Thériault
*2020 People's Choice - Trusted Advisor of the Year**

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. Join us in wishing our finalists the best of luck.

***The People's Choice category is won by number of votes for a finalist. Voting is only open to STEP members, and each member can only cast one vote.**

[Click here for more information on voting.](#)

Winners will be announced at the Virtual Awards Ceremony on **December 9, 2020.**

2020 Speakers' Series - Don't Miss Out!

Over 700 delegates are already registered for the 2020 Speakers Series! It's not too late for you to take advantage of this amazing opportunity to access 22 fantastic technical sessions.

Original broadcasts take place every Tuesday and Thursday at 12 noon ET, but you don't need to change your plans in order to calendar in these sessions. Archived versions of the broadcast will be available 24 hours after each session, making it easy for you to watch whenever it's convenient. This means you can still watch all of the September sessions that you've missed!

The Speakers' Series offers an unprecedented opportunity for those all around the country (members and non-members) to view the session material that would have been presented at our 22nd National Conference.

The Speakers' Series offers materials that practitioners of all levels will find beneficial, and you can receive up to 27.25 hours of CPD!

Are you curious to see what it's like? Click below to watch a 30 second clip.



Register today!

Connect with Us

Have you connected 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.

Follow STEP Canada's corporate page.

You can find the link to your local branch/chapter group on the STEP Canada corporate page.

Need help? View the [LinkedIn Cheat Sheet](#).



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

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. This document will be continually updated as policies change.

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

From the STEP Canada Member Services Committee

This 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. Thanks to the Member Services Committee for its work on this beneficial project

Special Interest Groups: <https://www.step.org/special-interest-groups>

STEP Special Interest Groups (SIGs) provide the opportunity for practitioners and related professionals to connect and advance their focused area of practice. Specialisms focus around some of the more complex issues families face in planning for their future surrounding international families protection of the vulnerable, family businesses, philanthropic giving, for example. The groups aim is to benefit the practitioner, their area of specialization, the clients they serve, and the industry at large.

Share the Benefit of STEP

Did you know?

STEP represents over 22,000 members Worldwide and over 2,900 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 members to join!

If you have a colleague you think would be interested in, or benefit from STEP membership, you can share [this 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 provides access to the highest caliber of trust and estate practitioners including lawyers, accountants, financial planners, insurance advisors and trust professionals. Our members are located all over Canada!

We offer 30-day job postings, which can be viewed 24 hours a day, 7 days a week on our website. STEP member firms receive discounted rates.

Are you seeking a new professional venture? Here are our current postings:

Senior Trust Officer - BMO Private Wealth, Calgary, AB

Senior Director Trust Operations - Concentra Trust, Remote

Have questions?

[More on Practitioner Opportunities](#)
[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)	March 1, 2021 June 1, 2021	February 1, 2021 May 1, 2021
STEP Diploma Program (English & French)	November 2, 2020 May 31, 2021	April 30, 2021
Essay Submission	May 1, 2021* October 1, 2021	-

**2021 topics will be posted in November 2020*

Notice from the Education Team

A reminder that deferrals for the November 2020 Diploma exams can be made from your online My STEP account by clicking the appropriate link under "My Courses & Marks". If you do not have this option available, you must submit your requests to education@step.ca.

Branch & Chapter Event Centre

Registration is open for our TEP Talks! Register early to save your spot for your local branch/chapters next TEP Talk.

**Capacity reached; waitlist available*

Wed
Oct 14

Wed
Oct 21

STEP Winnipeg
TEP Talk
Zoom

***STEP Toronto**
TEP Talk
Zoom

Fri
Oct 16

Wed
Oct 21

STEP Ottawa
TEP Talk
Zoom

***STEP Vancouver**
TEP Talk
Zoom

Wed
Oct 21

STEP Atlantic
TEP Talk
Zoom

Wed
Oct 21

STEP Calgary
TEP Talk
Zoom

Fri
Oct 23

STEP Southwestern Ontario
TEP Talk
Zoom

Mon
Oct 26

STEP Okanagan
TEP Talk
Zoom

STEP Inside Publication

The next edition of STEP Inside will be distributed by mail in mid-October. To ensure you receive a copy, check that your preferred mailing address and consent preferences have been updated with STEP Canada.

You can update your information by logging in to your My STEP online account. Once logged in, you can also access previous editions of the STEP Inside electronically.

If you require assistance, please contact [Member Services](#).

[Click here to login.](#)



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.

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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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STEP Canada
45 Sheppard Avenue East
Suite 510
Toronto, Ontario M2N 5W9
CA