

E-Newsletter Vol. 12 | Issue 10 | October 8, 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!

## 19th Annual STEP Private Client Awards

On September 19th, the STEP Private Client Awards ceremony was held at the London Hilton on Park Lane in London, UK. We are thrilled to congratulate Canadian firms **NIKA LAW LLP** (Employer of the Year) and **Crysalia** (Family Business Advisory Practice of the Year) on their well-deserved wins!

Seen as the hallmark of quality within the private client industry, these prestigious awards recognize and celebrate excellence. We are proud to see a growing Canadian presence being showcased on the global stage and extend our congratulations to all of this years nominees and winners.



**NIKA LAW LLP**  
Employer of the Year



**Crysalia**  
Family Business Advisory Practice of the Year

[View All 2024 Winners](#)

## We Want Your Questions!

An invitation to all members to submit questions to the 2025 CRA / STEP Roundtable Committee for consideration.



The 2025 CRA / STEP Round Table Committee invites you to submit questions to be considered for the 2025 Roundtable presentation that will take place during the 27th National Conference in June 2025. Each year the much anticipated CRA / STEP Roundtable proves to be a highlight of the conference; and an invaluable resource to estate planning practitioners across the country. Your contribution to the "question bank" will be appreciated by the committee; and if selected, by thousands of practitioners.

Questions must be received by **FRIDAY, NOVEMBER 15th** for consideration.

Submit Your Questions

## STEP Canada-USA Cross-Border Conference



And just like that, we have wrapped up the inaugural STEP Canada-USA Cross-Border Conference! Thank you to our delegates, sponsors, speakers, and staff for an incredible few days of connecting, learning, and engaging.

Some highlights include:

- Monday morning opening remarks from Committee Co-Chairs Rachel Blumenfeld and Ellen Kratzer
- A lively networking luncheon with roundtable discussions on key takeaways from Monday morning's three sessions
- A dynamic keynote presentation from the Honorable Ronald J. Klein on how the November 5th, 2024 presidential election could affect policy
- A buzzing Monday evening cocktail party courtesy of our Platinum Sponsor, Cardinal Point Wealth Management
- Tuesday morning opening remarks from the Chairs of STEP Canada and STEP USA, Rachel Blumenfeld and Paul Sczudlo
- Engaging technical sessions on a variety of cross-border related topics
- A thought-provoking closing keynote session by Patricia Saputo, "Are We on the Same Team?"

We extend a special thank you to our generous sponsors who made this unique experience possible. We encourage you to learn more about these organizations who support STEP and our community via the link below.

Thank You to our Sponsors

## STEP National Member Webcast

*Complimentary to all members and students of STEP Canada*  
Wednesday, October 16th, 2024  
12:00pm - 1:45pm ET

The STEP Canada Tax Technical Committee presents: **Impact of the Summer 2024 Tax Changes on Trusts & Private Clients**. This presentation will feature discussions on:

- Capital Gains
- Trust Reporting
- Changes to Post-Mortem Planning
- CEI, EOT, and LCG
- Relevant Tax Factors



**Kenneth Keung**  
CPA, CA, CPA (CO, USA),  
CFP, MTAX, LLB, TEP,  
Calgary  
Moody's Private Client



**Hemal Balsara**  
CPA, CA, CFP, FEA, TEP,  
Mississauga  
Manulife Financial



**Sébastien Desmarais**  
LLB, JD (USA), LLL, TEP,  
Ottawa  
TD Wealth



**Joan Jung**  
LLB, TEP, Toronto  
Miller Thomson LLP

[Details & Registration](#)

## Reminder: 2024 STEP CPD Audit Deadline

The 2024 Continuing Professional Development (CPD) Audit Review began on **August 27, 2024**, and the 59 randomly selected STEP Canada members were contacted by email. Undertaking and recording CPD activities is a requirement for maintaining your STEP membership, and it is recommended that all members maintain a record of their CPD activities and reflective practice throughout the year to ensure that, should you be chosen to submit your CPD records for review, you can easily comply with the audit requests.

Members who are retired, on maternity or long-term leave, should apply for Retired or Restricted Membership to ensure their membership records are up-to-date. Once approved, this will avoid you being selected for the audit as you will be entitled to a CPD exemption.

**Deadline approaching: Selected members have until October 27, 2024 to submit their CPD records.**

If you have questions or concerns please contact the CPD Team at [cpd@step.org](mailto:cpd@step.org).

[Learn More About CPD](#)

## Registration NOW OPEN for 2024-25 Program Season

We are pleased to announce that program registration is now open for all branches and chapters, including Branch Bundles, Passports, and individual seminars. Emails have been sent announcing the opportunities in your region, and we encourage members to click on their branch or chapter below to explore the excellent opportunities to engage, learn, and network at their upcoming local branch events.

[STEP Atlantic](#)

[STEP Calgary](#)

[STEP Edmonton](#)

[STEP Montreal](#)

[STEP Okanagan](#)

[STEP Ottawa](#)

[STEP Saskatchewan](#)

[STEP Southwestern Ontario](#)

[STEP Toronto](#)

[STEP Vancouver](#)

[STEP Winnipeg](#)

Members can also view the Event Calendar to see all upcoming events.

[View the Event Calendar](#)

## 2024 STEP Council Election Results



We are proud to congratulate **Pamela Cross**, TEP, of Borden Ladner Gervais LLP in Ottawa, ON, on her re-election to STEP Council.

Pamela was originally elected to Worldwide Council in 2021 for a three-year term, this new three-year term will end in 2027. Pamela will continue her service on STEP Worldwide's Public Policy Committee and Professional Standards Committee, and is the Chair of the STEP Worldwide Global Congress to be held in Rome in February 2025. Pamela is also a member of the STEP Worldwide Board of Directors which develops and oversees the Strategic Plan and will continue to bring the best of STEP Canada to the STEP Worldwide stage.

Congratulations Pamela and thank you for your dedication and support.

[Learn More About STEP Council](#)

## Searchable Resource Tool

**Reminder:** As a benefit of STEP membership, you can easily search and access content from our library, including a collection of PDF versions of presentation decks, formal papers, additional resources, and articles from Branch/Chapter seminars, National Conferences, and Webcasts, as well as articles from STEP Inside.

Since its launch in March 2022 there have been almost 10,000 individual searches, with some of the most popular search terms being "digital assets", "cross-border", "insurance", "spousal trust", "estate freeze", and "wills".

The SRT has continued to grow with over 10 years' worth of content, including recent events such as the 2023-24 Branch/Chapter Bundles and the 2024 National Conference.

Members can access the SRT by logging into their MY STEP account.



[Login to MY STEP](#)

## STEP Global Congress 2025

You can now book tickets for the next STEP Global Congress, which will be taking place in Rome, Italy on February 25 and 26, 2025. Congress will address the challenges and opportunities presented by the next generation of wealth holders; the fight against economic crime; and the debate over implementing a global wealth tax, offering diverse perspectives on potential impact and feasibility.

[Details & Registration](#)

## 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.

[Lead Expert Wealth Management Solutions - National Bank \(Toronto, Calgary, or Vancouver\)](#)

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	March 3, 2025	February 3, 2025
STEP Canada Diploma Program All Courses	November 4, 2024	Registration closed
	May 26, 2025	March 1, 2025
Essay Submission	October 1, 2024	*2024 topics can be found <a href="#">here</a>

## Updates

### DIPLOMA PROGRAM

We're excited to announce that instructor-led tutorials for each of the diploma courses will be held throughout October. To find your specific session date and time, please check your course website. Registration links and the case study questions that will be covered can be found under the "Instructor Tutorial" section. These sessions will include dedicated Q&A time with your instructor, and attendance is highly recommended. If you're unable to attend, recordings will be made available.

### Assignment Reminder – English Stream Only

Both the *Law of Trusts* and *Wills, Estate & Trust Administration* courses have an assignment submission deadline of **November 3, 2024, at 11:59 PM EST**. Please check your course website for details.

### Exam Procedures

Comprehensive instructions, including step-by-step guides in both print and video formats, will be provided to help you prepare for the exam. A system demo will also be available in your classroom in the coming weeks. Please review all materials thoroughly to ensure you are fully prepared for exam day.

Exam credentials will be emailed to you by **October 18, 2024**.

**Important Reminder: The Diploma Program exam is scheduled for November 4, 2024.  
Best of luck to all students preparing for this important date!**

---

## Connect With Us on LinkedIn

Check out one of our recent LinkedIn posts:



*STEP Canada members, check your email!*

*We're always looking for ways to enhance the value and relevance of our programs, and we know that no one is better positioned to guide us than you, our members. We recently reached out to you to ask for your input to help us better understand how our events can best serve you and your professional development.*

*Check your email (subject line: Survey: Help Us Improve Your STEP Canada Experience), complete the brief survey, and enter yourself in for a prize draw of a Bose SoundLink Revolve+ II Bluetooth Speaker. If you can't find the email, please check your junk/spam folders or send an email to [memberservices@step.ca](mailto:memberservices@step.ca).*

*We truly appreciate your feedback!*

[#STEP](#) [#STEPCanada](#) [#TEP](#) [#Survey](#) [#Membership](#) [#Events](#)

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](#)

---

## Reminders

**STEP Canada staff** work remotely and 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.

---

## Quick Links

[STEP Canada Website](#)

[STEP Member Directory](#)

Click to [edit Email Preferences](#) or [Unsubscribe](#) from this list.

STEP Canada  
45 Sheppard Avenue East  
Suite 510  
Toronto, ON M2N 5W9 - Canada  
Telephone: 416-491-4949