



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!

CONTENTS:

Private Client Awards

2020 Speakers Series

Inside the App

Connect With Us

eNews Updates

Share The Benefits of STEP

Practitioner Opportunities

Education Centre

**Branch & Chapter Event
Centre**

Reminders

Contact Us

**Scroll down to learn
about your branches/chapters
upcoming TEP Talks!**

STEP Private Client Awards - Finalists Announced!



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. Members who wish to vote should watch for communication from STEP Worldwide to complete their ballot.*

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

2020 Speakers' Series - Register Now

Registration is well under way for the Fall 2020 Speakers' Series! You don't want to miss out.

Join hundreds of delegates in viewing 22 engaging and technical broadcasts from September 15th through November 26th. Original broadcasts will be posted every Tuesday and Thursday at 12 noon ET, with a live chat room running in tandem for Q&A with the speakers.

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!

Register today!

Inside the Speakers' Series App

All information for the 2020 Speakers' Series is housed in our Speakers' Series app. Here, you can find the link to watch all broadcasts, additional presentation materials, information on our sponsors, interact with other attendees, and much more.

The Speakers' Series app will continue to live on even after the final broadcast on November 26th, providing you with fantastic educational resources for years to come.



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](#).



eNews Updates

eNews - August 24, 2020

STEP Canada Trust & Estate Technical Committee
Response to Ontario Attorney General
RE: Estate Law Consultation

On August 24th, the STEP Canada Executive Committee and STEP Canada Trust and Estate Technical Committee sent a submission to the Ontario Attorney General in response to the Estate Law Consultation. Please [follow this link](#) to view the STEP submission.

Our thanks to all who provided input into this work.

Paul Taylor, STEP Ottawa Regional Branch Chair
Elaine Blades, STEP Toronto Regional Branch Chair
Justin Hoffman, STEP Southwestern Ontario Regional Chapter Chair

Share the Benefit of STEP

Did you know?

STEP represents over 22,000 members Worldwide and over 2,700 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.

The COVID-19 pandemic has caused many employers perform unfortunate layoffs in the trust and estate industry, creating an abundance of highly skilled practitioners who now don't have a job. Many companies slowed down or ceased hiring completely, but with things slowly moving back to normal, we understand that you, the employer, may now be looking for that perfect person to fill a role in your organization.

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:

Planning Services Consultant - PPI Advisory, Montreal, QC

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	February 1, 2021
STEP Diploma Program (English & French)	November 2, 2020 May 31, 2021	October 2, 2020 April 30, 2021
Essay Submission	October 1, 2020 May 1, 2021*	-

*2021 topics will be posted in November 2020

Notice from the Education Team

Grades from the August exam session were posted to the member accounts at step.ca under "My courses & marks" by August 31, 2020. Course registration is completed through your MY STEP portal under "Assessment by Exam Enrollment".

Branch & Chapter Event Centre

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

**Capacity reached, waitlist available*

Wed Sept 9	STEP Winnipeg TEP Talk Zoom	Fri Sept 11	STEP Ottawa TEP Talk Zoom
Wed Sept 16	*STEP Toronto TEP Talk - AKA STEPping out to Lunch Zoom	Wed Sept 16	*STEP Vancouver TEP Talk Zoom
Mon Sept 21	STEP Saskatchewan TEP Talk Zoom	Wed Sept 23	STEP Atlantic TEP Talk Zoom
Wed Sept 23	STEP Calgary TEP Talk Zoom	Mon Sept 28	STEP Okanagan TEP Talk Zoom
Wed Oct 14	STEP Winnipeg TEP Talk Zoom	Wed Oct 21	STEP Edmonton TEP Talk 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.

[RETURN TO TOP](#)

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

[Click to view this email in a browser](#)

If you no longer wish to receive ANY emails from STEP Canada, please reply to this message with "Unsubscribe" in the subject line or simply click on the following link: [Unsubscribe](#)

[Click here to forward this email to a friend](#)

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