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*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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2022-23 Branch/Chapter Bundles

No matter how you attend, in-person or online, the six seminars included in the 2022-23 hybrid Branch/Chapter Bundle offer in-depth technical content, excellent value, and continuing education (CPD) opportunities.

STEP Canada will offer two national seminars in September and January, which will be broadcast online to all Branch & Chapter Bundle delegates across the country. Most branches & chapters will also offer it's delegates the option to attend live in-person or view the e-archived on-demand version of the four local seminars.

Save the date for our first national seminar:

Drafting the Inclusive Estate Plan for the Modern Canadian Family
Wednesday, September 21st, 2022
12:00pm - 2:00pm ET

Click here for more information

Reminder: CPD Requirements for STEP Members

STEP's CPD Policy and Resources support members to develop their professional competence.

STEP members are required to undertake, and to maintain a record of, their CPD. STEP uses 'role benchmarking', with an outcomes based approach to CPD focusing on maintenance and development of professional competence through undertaking CPD that is specifically relevant to the individual. Using role benchmarking, members are required to match their CPD against the key responsibilities in their work role.

One requirement for STEP members is to complete one CPD activity per year that relates to ethics, however, there is no 'hours' or 'points' requirement for STEP CPD. Members are required to ensure that their CPD meets the needs as identified against the responsibilities of their professional role and to meet the reasonable expectations of their stakeholders.

STEP conducts ongoing reviews of members' CPD records and may request to see those at any time during the year.

More Information on Continuing Professional Development

STEP's CPD Policy

CPD Planning and Recording

CPD FAQ's

The CPD team is happy to answer your questions. Please email them at **CPD@step.org**.

Did you know that STEP has a website to assist families by providing them information on planning their futures?

This website houses an information portal that can provide clarity about many complex issues for families, such as Managing Money, Foreign Affairs, and Life 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.

Advising Families

A Statement from the STEP Private Client Awards Team

We have been saddened to hear of the death of Her Majesty Queen Elizabeth II. As head of state in a number of countries where STEP has members, Queen Elizabeth II's historic reign has had a far-reaching impact.

We are sorry to announce that in light of the news, we have decided to postpone the STEP Private Client Awards.

This not a decision we have taken lightly, however we do not feel that it would be appropriate to hold an event of this kind during a period of National Mourning, which is a time for reflection in response to the demise of the Sovereign.

We sincerely apologise for the inconvenience this may cause you, but hope you can understand why we have needed to take this decision.

*We have acted as quickly as possible in the hope that you can reschedule any travel arrangements. Having spoken to the venue and suppliers, we are pleased to have secured a new date for the event on 13 December 2022. We hope that you will be able to join us for this new date. We understand that this may not be convenient for everyone, and can provide a full refund on places as required. Please contact us to let us know on **pca@step.org**.*

*For those who were booked to stay at the venue overnight, the hotel has confirmed that it can move any room bookings to this new date at no extra charge. Alternatively it can provide a full refund if you can no longer attend. Please contact Iwona Lesniak via email on **Iwona.Lesniak@hilton.com** to make arrangements as appropriate.*

Thank you for your patience and continued support.

- The STEP Private Client Awards team

17th Annual STEP Private Client Awards

This ceremony will celebrate the success and recognize the achievements of practitioners, teams, and firms from around the world.

Best of luck to the eight Canadian finalists:

TD Wealth Private Trust, Tax Services
Accountancy Team of the Year (midsize firm)

Your Digital Undertaker®
Digital Assets Practice of the Year

NIKA LAW LLP
RBC Wealth Management, Royal Trust
Employer of the Year

KPMG Private Enterprise
Family Business Advisory Practice of the Year

KPMG Family Office
Multi-Family Office Team of the Year

Whaley Estate Litigation (WEL) Partners
Vulnerable Client Advisory Practice of the Year

Lesley Donsky TEP, RBC Royal Trust
Young Practitioner 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 this excellence.

Click here to view all 2022 finalists

More information

CE/CPD Credits for Past Events

Members are reminded that access to all apps including the 2020 Speakers' Series, 2021 Q1 & Q2 Branch Bundles, 2021 National Conference, 2021-22 Branch/Chapter Bundles, and 2022 National Conference will only be available until December 31, 2022. The PowerPoint presentations from these events will all shortly be available in the Searchable Resource Tool (SRT).

CPD certificates for the 2021-22 Branch Bundle sessions are currently being prepared and sent. Members who have not yet taken the quiz for any seminars they have viewed can still do so to receive their CPD credits.

CPD certificates for the 24th National Conference will be sent in September 2022.

If you have concerns regarding your credits, please email **memberservices@step.ca**.

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 2023, 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.**

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.

Regional Estate & Trust Administrator - MD Financial Management (Victoria, 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, 2023 June 1, 2023	February 1, 2023 May 1, 2023

STEP Canada Diploma Program	November 7, 2022 May 29, 2023	Registration Closed March 29, 2023
Essay Submission	October 1, 2022 May 1, 2023	***2022 topics can be found here** (new topics will be released in January 2023)

Updates

Diploma Program
The first round of peer learning sessions will take place the week of September 19th. Students should login to their course website for details and case study materials. If you haven't registered yet and would like to participate, email **education@step.ca**.

The second peer learning sessions are scheduled for the week of October 3rd. Visit your course website to register and view the case study materials.

Instructor Tutorial sessions will take place mid October. An email will be sent when dates are confirmed. Registration and more details will be on your course website shortly.

Certificates: Program completion certificates for both the Diploma Program and CETA will be mailed out to all those that have finished a STEP Canada education program between 2020 and the most recent term. The preferred address in your STEP Canada profile will be used. Please ensure this is up to date by logging in to your MY STEP account at **step.ca** and editing your profile information.

Connect With Us on LinkedIn

Latest post from the STEP Canada LinkedIn corporate page:

STEP Canada is thrilled to announce the latest recipients of the prestigious Trust and Estate Practitioner (TEP) designation. The below members were granted the designation on September 1, 2022.

The TEP designation formally distinguishes these qualified practitioners from non-specialists, and offers a competitive advantage in attracting clients.

Please join us in congratulating our new TEPs for all their hard work and dedication.

#STEP #STEPCanada #TEP #NewMembers #Education #Networking #Congratulations

Want to see 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.

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**.

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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