
E-Newsletter Vol. 12 | Issue 9 | September 10, 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!

Registration NOW OPEN for 2024-25 Program Season

We are pleased to announce that program registration is now open for most 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](#)

Security Updates to Your MY STEP Accounts

To protect our members and their information, STEP Canada has enhanced security by adding an extra layer of protection to your online MY STEP account. Upon logging in, all members will now be required to enter in a One-Time Password that will be sent to their preferred email address on file. Members can also choose to activate Google Authenticator on their phones as an alternative to receiving the code emails.

Members are encouraged to whitelist or save @step.ca email addresses to their safe sender lists to ensure they receive the code emails.

Questions or concerns can be directed to memberservices@step.ca.

2024 STEP CPD Audit

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.

Selected members will 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.

Learn More About CPD

STEP Canada-USA Cross-Border Conference



IN-PERSON | October 6 - October 8, 2024
Chicago Marriott Downtown Magnificent Mile

REGISTRATION UPDATE:

We are pleased to announce additional registration opportunities for our Canadian members! With less than a month until the conference, many Canadian and American practitioners have already confirmed their attendance - will you be joining them?

SPEAKER LINEUP:

Discover the impressive lineup of panelists who will be leading the conference program. [Explore the program schedule](#) today.

NEED ACCOMODATIONS?:

Guest rooms are being held based on availability until **Thursday, September 12, 2024**. Reserve yours now to enhance your conference experience. [Click here for more information.](#)

MEET OUR GENEROUS SPONSORS:

Special thanks to all the generous organizations contributing to the success of this conference. To view all the sponsoring organizations, [click here](#).

Details & Registration

Final Questions & Answers from the STEP Canada / CRA Roundtable

The highly anticipated 2024 STEP Canada / CRA Roundtable session was presented on Tuesday, June 4th. During the session, senior CRA representatives answered questions submitted by trust and estate professionals regarding specific cases and general issues of concern for both practitioners and their clients. STEP Canada would like to thank the following panel participants for their contributions:

- Paul Taylor, LLB, TEP, Ottawa: Borden Ladner Gervais LLP
- Michael Cadesky, FCPA, FCA, FTIHK, CTA, TEP (Emeritus), Toronto: Cadesky Tax
- Angela Ross, LLB, TEP, Toronto: PwC LLP
- Steve Fron, CPA, CA, TEP: Manager, Trust Section II, Income Tax Rulings Directorate, CRA
- Marina Panourgias, CPA, CA, TEP: Manager, Trust Section I, Income Tax Rulings Directorate, CRA

STEP Canada members can access this valuable resource by logging in to their MY STEP account, or, by clicking on the link below.

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



**STEP
GLOBAL
CONGRESS 2025**

25-26 FEBRUARY 2025, ROME
Tomorrow's wealth – reshaping the conversation

Register by **20 September 2024**
to save with our early bird rate

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](#)

26th National Conference CPD/CE Certificates

STEP CANADA 26

NATIONAL CONFERENCE | 1998-2024



For online delegates, or those who wish to rewatch or watch any concurrent sessions they missed, all sessions have been archived and are available for on-demand viewing until December 31, 2024. Delegates can find all sessions available through the 26th National Conference App.

The maximum CPD available is 22.25 hours for all 18 sessions.

CPD/CE certificates have now been sent to all registered delegates who attended in-person or viewed an online session before August 16th, 2024. Additional CPD/CE certificates will be sent for sessions viewed after this date.

[Click here for more CPD information.](#)

Note: Participation at the STEP Canada National Conference in-person or online is designed to meet your ongoing STEP CPD requirements. For more information, see below.

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.

[Practice Lead, Estate & Trust Consultant - Scotiabank \(Vancouver, BC\)](#)

[Associate Director, Legacy - BC Children's Hospital Foundation \(Vancouver, BC\)](#)

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 May 26, 2025	Registration now closed March 1, 2025
Essay Submission	October 1, 2024	*2024 topics can be found here

Updates

[DIPLOMA PROGRAM](#)

Virtual Learning Sessions: Save the Dates!

Check your classroom for the fall term schedule of our virtual learning sessions, which include mentorship circle sessions and an instructor tutorial. Don't miss out on these essential sessions designed to support you at every stage of your educational journey. Register today through the links provided in your classroom.

Assignments – English Stream Only

Each course includes assignments as part of the curriculum and evaluation. Deadlines for the assignments are listed in your classroom and vary by course. Please review the due dates carefully to ensure timely submission.

Connect With Us on LinkedIn

Check out one of our recent LinkedIn posts:

Congratulations to our new TEPs!



Diploma Programs

Alexandre Hunault, TEP, STEP Montreal
Amy Thambirajah, TEP, STEP Toronto
Audrey Veltri, TEP, STEP Calgary
Caroline Bruggeman, TEP, STEP Southwestern Ontario
Charles Rioux Rousseau, TEP, STEP Montreal
Chia Hsuan Allisa Wu, TEP, STEP Okanagan
Daniel Panza, TEP, STEP Toronto
Darren Rotsch, TEP, STEP Toronto
David Truong, TEP, STEP Montreal
David Field, TEP, STEP Toronto
Deanna Nistor, TEP, STEP Calgary
Dennis Ngo, TEP, STEP Toronto
Éloïse Lafortune Viger, TEP, STEP Montreal
Erin Carter, TEP, STEP Ottawa
Fadia Abou-Nassif, TEP, STEP Montreal
Francesca Loreto, TEP, STEP Toronto
Gabrielle Robert, TEP, STEP Ottawa
Geneviève Gosselin-Tardif, TEP, STEP Ottawa
Jake Milligan, TEP, STEP Southwestern Ontario
Jane Capwell, TEP, STEP Vancouver
Jean Yong, TEP, STEP Toronto
Jennifer Lewis, TEP, STEP Toronto
Jian Hong Guo, TEP, STEP Vancouver
Jiao Wang, TEP, STEP Toronto
Joshua McQuay, TEP, STEP Toronto
Julianne Couture-Choquette, TEP, STEP Montreal
Junhong Du, TEP, STEP Toronto
Justin Irwin, TEP, STEP Toronto
Kayla Siu, TEP, STEP Vancouver
Lorela Isaj, TEP, STEP Toronto
Lorenzo Armena, TEP, STEP Toronto
Lydia Grubb, TEP, STEP Southwestern Ontario
Manish Gosrani, TEP, STEP Toronto
Marc-Andre Bazinet, TEP, STEP Montreal
Marcela Aroca, TEP, STEP Southwestern Ontario
Matthias Duensing, TEP, STEP Toronto
Michael Hoffman, TEP, STEP Saskatchewan
Michael Lutes, TEP, STEP Ottawa

Michaela Fazio, TEP, STEP Southwestern Ontario
My Binh Ngo, TEP, STEP Toronto
Naail Jivani, TEP, STEP Vancouver
Nathalie Badr, TEP, STEP Ottawa
Noah Goldstein, TEP, STEP Toronto
Noah Marks, TEP, STEP Toronto
Peter Ten Voorde, TEP, STEP Southwestern Ontario
Qun Zhang, TEP, STEP Vancouver
Richard Reif, TEP, STEP Winnipeg
Rupa Paul, TEP, STEP Toronto
Samuel Levine, TEP, STEP Ottawa
Shane Landreville, TEP, STEP Vancouver
Shouli Ma, TEP, STEP Toronto
Sivamalar Navaratnarajah, TEP, STEP Toronto
Spencer Naito, TEP, STEP Okanagan
Steven Meldrum, TEP, STEP Calgary
Suganya Devappa, TEP, STEP Toronto
Tao (Tony) Liu, TEP, STEP Edmonton
Terri Langille, TEP, STEP Atlantic
Tommy Lo Ping Huang, TEP, STEP Vancouver
Vadim Ayrapetyan, TEP, STEP Toronto
Walter Fawcus, TEP, STEP Vancouver
Weijun Wan, TEP, STEP Toronto
William Henderson, TEP, STEP Calgary
Winnie Ho, TEP, STEP Vancouver
Ying Zhan, TEP, STEP Vancouver
Ying Ji, TEP, STEP Toronto
Yun-Jih Liao, TEP, STEP Toronto
Zachary Geldert, TEP, STEP Atlantic

Essay Program

Michael von Keitz, TEP, STEP Toronto
Salomon Elbaz, TEP, STEP Montreal

Expertise

Jo-Anne Stark, TEP, STEP Vancouver
Kaye Bland, TEP, STEP Toronto
Salvatore De Cillis, TEP, STEP Toronto
Stephan H. Trihey, TEP, STEP Montreal

STEP Canada is proud to announce the latest recipients of the prestigious Trust and Estate Practitioner (TEP) designation. The above members were granted the designation in July and August of 2024.

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

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

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 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.

Reminders

Quick Links

[STEP Canada Website](#)

[STEP Member Directory](#)

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