



eNews – November 27, 2020
STEP Canada Tax Technical Committee / National Conference & Fall
Speakers' Series Committee

RE: Final Questions & Answers from the 2020 STEP Canada / CRA Round Table

STEP Canada is thrilled with the success of the Fall 2020 Speakers Series, which quickly became our largest ever event bringing in over 800 delegates from around the country and internationally, all housed in a new virtual environment in place of our 22nd National Conference.

Our highly anticipated **STEP Canada / CRA Round Table** session was presented on Thursday, November 26th. During this 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 in contributions preparing and presenting this year's Round Table session:

Christine Van Cauwenberghe, LLB, CFP, RRC, TEP, Winnipeg: IG Wealth Management

Michael Cadesky, FCPA, FCA, FTIHK, CTA, TEP, Toronto: Cadesky Tax

Kim G.C. Moody, FCPA, FCA, TEP, Calgary: Moodys Tax

Steve Fron, CPA, CA, TEP, Oshawa: Manager, Trust Section II, Income Tax Rulings Directorate, Canada Revenue Agency

Phil Kohnen, CPA, CMA, TEP, Ottawa: Technical Advisor, Financial Industries and Trusts Division, Income Tax Rulings Directorate, Canada Revenue Agency

We are pleased to deliver the final 2020 STEP Canada / CRA Round Table Questions & Answers to STEP Canada members and Speakers' Series attendees. STEP Canada members can access this resource in their My STEP Canada Portal under the Resource Box, after logging on to step.ca.

We sincerely appreciate all the time and effort our industry experts devote to crafting the programming for this event. STEP Canada national committees work closely and cooperatively with the Canada Revenue Agency to maintain a relationship that benefits our valued members and conference delegates.

STEP Canada Tax Technical Committee

STEP Canada National Conference/Fall 2020 Speakers' Series Committee

About STEP: The Society of Trust and Estate Practitioners is the leading international organization for trust and estates professionals. Headquartered in London, England, it has more than 22,000 members worldwide in 95 countries.

STEP Canada, founded in 1998, has over 3,000 members with branches in the following cities and regions: Atlantic, Montreal, Ottawa, Toronto, Winnipeg, Calgary, Edmonton, Vancouver and chapters in Okanagan Valley, Saskatchewan, and Southwestern Ontario. STEP is a multi-disciplinary organization with the most experienced and senior practitioners in the field, including: lawyers, accountants, financial planners, insurance advisors and trust professionals. They provide domestic and international advice on trust and estates, including planning, administration and related taxes.

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