



eNews – September 2, 2021
STEP Canada Public Policy Committee

RE: STEP Vulnerable Client Symposium Final Report

On March 8, 2021 STEP Canada's Public Policy Committee hosted a virtual invitation only symposium to start a cross sector conversation on the issues, barriers, and opportunities to better serve and support vulnerable clients. Seventy-nine leaders and professionals who have devoted their energies to preventing, recognizing, and responding to the abuse and mistreatment of vulnerable people had candid conversations about the challenges and the need to collaborate to support systemic change. Delegates reinforced the importance of these types of cross sector discussions and the need for both professional and public education.

[This Report](#) summarizes the event. It documents what was heard, and the ideas generated, including suggestions for STEP Canada. It includes a list of resources generated from the participants that all practitioners will find useful. STEP Canada is now in the process of identifying and prioritizing the strategies and activities that STEP Canada can pursue to help advance these ideas.

As a member of STEP, we hope you will find the report beneficial to your practice and encourage you to keep this critical issue in your conversations with colleagues and clients. Feel free to share this report with colleagues and on social media, as you see fit.

If you have any questions or comments please address them to: [Michael Dodick](#) Chief Operating Officer, STEP Canada.

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Chris Ireland
Chair, STEP Canada

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Peter Weissman
Chair, STEP Canada Public Policy 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 100 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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