



eNews – October 5, 2023
STEP Canada Tax Technical Committee / National Conference
Program Committee

**RE: Final Questions & Answers from the 2023 STEP Canada /
CRA Roundtable**

The Board of Directors of STEP Canada is pleased with the successful outcome of the 25th National Conference, which has once again become our largest event ever, attracting over 1020 delegates from across the country to downtown Toronto and hosted in a virtual environment.

Our highly anticipated 2023 STEP Canada / CRA Roundtable session was presented on Tuesday, June 20th. 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 their contributions in preparing and presenting this year's Roundtable session:

- **Pamela Cross**, LLB, TEP, Ottawa: *Borden Ladner Gervais LLP*
- **Michael Cadesky**, FCPA, FCA, FTIHK, CTA, TEP (Emeritus), Toronto: *Cadesky Tax*
- **Kim G.C. Moody**, FCPA, FCA, TEP, Calgary: *Moodys Tax Law 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*

We are pleased to deliver the final [2023 STEP Canada / CRA Roundtable Questions & Answers](#) to STEP Canada members and conference delegates. In addition, STEP Canada members can access this resource in their My STEP Canada Portal under the Resource Box: STEP/CRA Roundtable Q&As, 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.

Tax Technical Committee
National Conference Program Committee
STEP Canada

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 over 100 countries.

STEP Canada, founded in 1998, has over 3,400 members with branches in the following cities and regions: Atlantic, Montreal, Ottawa, Toronto, Winnipeg, Calgary, Edmonton, and Vancouver, with chapters in Okanagan Valley, Saskatchewan, and Southwestern Ontario. STEP is a multidisciplinary 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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