



E-Newsletter Vol. 12 | Issue 4 | April 9, 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!

2024-25 Membership Renewals

Reminder - It's Time to Renew Your STEP Membership

If you haven't already done so, please log in to your MY STEP account via the link below to process your 2024-25 membership renewal that was due April 1st, 2024.

Renewing your membership with STEP Canada will allow your continued use of the TEP designation (if applicable) and grant you multiple membership benefits such as discounts on programs/seminars, member-only publications and resources, access to the Searchable Resource Tool (SRT), advocacy and representation from STEP, and much more.

STEP Canada is proud to continue increasing the value of your membership by delivering these and other benefits, without any increase to your annual membership fee.

[Login Today to Renew Your Membership](#)

26th Annual National Conference



BUILDING CONNECTIONS, SHARING KNOWLEDGE

The countdown begins! In less than two months, hundreds of delegates will come together for STEP Canada's 26th National Conference, which will feature a robust program lineup and ample opportunities to connect and network with STEP members and practitioners. Register today to join us in-person on June 3-4 at the Sheraton Centre Toronto Hotel.

SPEAKER LINE UP

The list of outstanding panelists who will be leading the Conference program has been published! Check out who you'll be listening to by exploring the [program schedule](#) today.

NEW THIS YEAR

We're ending the conference on a high note! The grand finale will be the highly anticipated STEP Canada / CRA Roundtable, and you won't want to miss it.

CPD/CE ACCREDITATION

Earn up to 22.25 hours of substantive CPD/CE credits. [Click here](#) to view the complete accreditation list.

MONDAY NIGHT INTERACTIVE COCKTAIL PARTY

Enjoy the company of friends and colleagues in a state-of-the-art venue at a NEW style of STEP Canada social event. Mingle at different food and drink stations, marvel at unique performances by local artists, and listen to toasts and remarks from STEP members.

[Details & Registration](#)



19th Annual
STEP PRIVATE CLIENT Awards

DEADLINE APPROACHING

Entries close on April 12, 2024 at midnight

STEP
ADVISING FAMILIES ACROSS GENERATIONS

Have you completed your entry for this year's STEP Private Client Awards yet? The deadline is quickly approaching! Open to both STEP members and non-members, these awards are seen as the hallmark of quality within the private client industry, Don't miss your opportunity to be recognized and celebrated among your peers!

Entries will close on April 12th, 2024 at midnight GMT and the winners will be announced at the Awards Ceremony on September 19, 2024 in London, UK.

[Details](#)

Save the Date: STEP Canada-USA Cross-Border Conference



Do you have a specialized interest in Canada-USA Cross-Border topics? Then save the date in your calendar for the inaugural STEP Canada-USA Joint Cross-Border Conference!

This in-person conference will showcase numerous opportunities for cross-border networking, and will take place in **Chicago** from **Sunday, October 6th** through **Tuesday, October 8th, 2024**. There will be limited capacity for this event.

Watch step.ca for more information to be released in the next few weeks.

eNews Update

eNews - March 28, 2024

From the **STEP Canada Tax Technical Committee**

RE: NEW - Bare Trusts are Exempt from Trust Reporting Requirements for 2023

[View the Announcement](#)

Sources for CPD/CE Credits



CPD is a requirement for maintaining STEP membership for all membership types that are currently working.

Did you know that reading the STEP Journal and STEP Inside also count towards STEP's CPD requirement?

[View the Announcement](#)

[View STEP's CPD Policy](#)

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.

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	June 10, 2024	May 10, 2024
	September 4, 2024	August 4, 2024
STEP Canada Diploma Program	May 27, 2024	Registration Closed
	November 4, 2024	September 1, 2024
Essay Submission	May 1, 2024	

Updates

Diploma Program

Trust and Estate Planning Students

Reminder that course assignment #2 is due April 15, 2024 by 11:59pm EST. If you have deferred your exam to November, you do not have to complete the assignments for this current term.

** note that the above assignment is not applicable to the French Diploma students*

Diploma Program: English & French streams

Instructor led tutorials will be taking place for each of the diploma courses starting in May. The registration link and case study questions that will be reviewed are under the "Instructor Tutorial" section of your course website. These sessions include Q&A time with your instructor; attendance is strongly encouraged. The tutorials will be recorded for those that cannot attend.

Connect With Us on LinkedIn

Check out our latest LinkedIn post:

Congratulations to our new TEPs!

Diploma Programs

- Ashna Bali, TEP, STEP Edmonton
- Bushra Ahmed, TEP, STEP Toronto
- Randall Craig, TEP, STEP Toronto
- Catherine Beauchamp, TEP, STEP Montreal
- Graham Fuga, TEP, STEP Winnipeg
- Karen Feng, TEP, STEP Toronto
- Lester Nazareth, TEP, STEP Toronto
- Philip Mei, TEP, STEP Calgary

Rocky Wang, TEP, STEP Toronto

Steve Parr, TEP, STEP Vancouver

Sunny Sun, TEP, STEP Calgary

Yong Xia, TEP, STEP Calgary

Expertise

- Allison Katarey, TEP, STEP Saskatchewan
- Marcel Godbout, TEP, STEP Atlantic Provinces

STEP CANADA

STEP Canada is proud to announce the latest recipients of the prestigious Trust and Estate Practitioner (TEP) designation. The below members were granted the designation in March and April 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

Upcoming Branch & Chapter Events

STEP Okanagan

[Chapter Bundle Seminar](#)
April 16, 2024
3:00pm - 5:00pm PT
BMO Private Wealth,
Kelowna

STEP Winnipeg

[Branch Bundle Seminar](#)
April 16, 2024
12:00pm - 2:00pm CT
Del Crewson Conference
Centre, Winnipeg

STEP Southwestern Ontario

[Chapter Bundle Seminar](#)
April 16, 2024
4:00pm - 6:00pm ET
KPMG Offices in London,
Kitchener, and Windsor

STEP Toronto

[Branch Bundle Seminar](#)
April 17, 2024
3:00pm - 5:00pm ET
Gowling WLG (Canada)
LLP, Toronto

STEP Edmonton

[Branch Bundle Seminar](#)
April 18, 2024
4:00pm - 6:00pm MT
Manulife Place, Third
Floor, Edmonton

STEP Saskatchewan

[Chapter Bundle Seminar
& Annual Chapter Meeting](#)
April 24, 2024
3:00pm - 5:00pm CST
Saskatoon Club,
Saskatoon

STEP Toronto

[STEPping out to Lunch](#)
May 6, 2024
11:45am - 1:00pm ET
Aird & Berlis LLP, Toronto
limited capacity

STEP Calgary

[Social Event & Annual
Branch Meeting](#)
May 9, 2024
4:00pm - 6:00pm MT
Ranchmen's Club,
Calgary

STEP Montreal

[Branch Bundle Seminar
& Annual Branch Meeting](#)
May 9, 2024
12:00pm - 2:00pm ET
Borden Ladner Gervais
LLP, Montreal

STEP Toronto

[Branch Bundle Seminar,
Social Event, & Annual
Branch Meeting](#)
May 14, 2024
3:00pm - 7:00pm ET
Gowling WLG (Canada)
LLP, Toronto

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.

Quick Links

STEP Canada Website

STEP Member Directory

Click to [edit Email Preferences](#) or [Unsubscribe](#) from this list.

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