



E-Newsletter Vol. 13 | Issue 4 | April 8, 2025

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!

[STEP Canada Website](#)

[STEP Member Directory](#)

[Advising Families Canada](#)

[Practitioner Opportunities](#)

It's Time to Renew Your Membership

On March 3rd, all STEP Canada members were mailed their annual renewal package containing details for this year's renewal period, at the same time the portal in your MY STEP account opened for processing membership renewal dues.

The deadline to renew your membership for 2025-26 was April 1, 2025.

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

If you have any questions or concerns regarding your membership renewal, please reach out to our Member Services team by emailing memberservices@step.ca.

[Login to MY STEP](#)

Grow Your Connections at the 27th National Conference

ONLY A FEW IN-PERSON REGISTRATIONS LEFT UNTIL WE SELL OUT – REGISTER TODAY!

Once we reach capacity, a waitlist will be started. If you have not yet registered for in-person viewing and are going to be traveling to Toronto for the conference, please ensure you book your accommodations first as there are very few hotel rooms still available. This way, you can avoid a cancellation fee if you are unable to secure accommodations.

ANOTHER OPTION: REGISTER FOR ONLINE ON-DEMAND ACCESS

Even if you can't join us in-person, you can still benefit from the fantastic program and 22.25 hours of CPD. Register for online on-demand viewing and watch all 19 sessions from the comfort of your home or office, at your leisure!

See what our attendees have said:

"The STEP conference is always the best in terms of education content and diversity."

"The conference is THE educational event of the year."

"The conference was much more professional, and everything flowed smoothly."

"This conference was one of the best I have ever attended. It was well organized, offered fantastic food, and the content of the presentations was top-notch."

[Details & Registration](#)

STEP's 20th Annual Private Client Awards

The prestigious STEP Private Client Awards celebrate their 20th anniversary in 2025! Seen as the hallmark of quality within the industry, 25 unique categories will be open for entry until **April 11th, 2025**. Winners will be announced at the Awards Ceremony in London, UK on September 18, 2025.

Canadians - don't miss out! Submit your entry today.

"Being recognised on a global scale with such a prestigious award gives us tangible proof for our commitment to excellence."

- **Patricia Saputo**, TEP, Crysalia - Montreal, QC
Winner of Family Business Advisory Practice of the Year 2024

[Learn More](#)

2024 STEP Founder's Awards Recipients



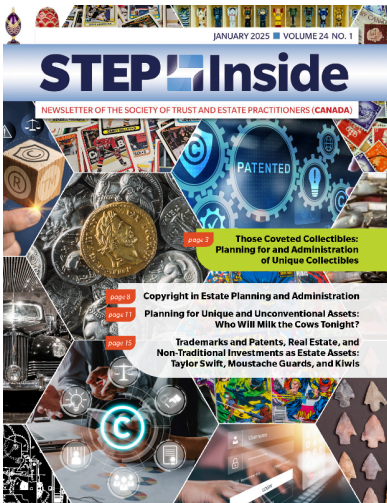
STEP Canada is proud to congratulate Daniel Frajman and Ian Lebane on their well-deserved recognition as 2024 Founder's Awards recipients!

The Founder's Award for Outstanding Achievement is awarded to exceptional volunteers who have made an extraordinary and outstanding long-term contribution to the Society, above and beyond what is normally expected of a volunteer.

Please join us in thanking Daniel and Ian for their continued support of STEP, and congratulating them on this remarkable achievement.

[More Information](#)

Contribute to STEP Inside



Attention Readers!
Are you interested in contributing to STEP Inside?

As an Author:

Each issue contains 2-3 lead articles and 7 regional “In the Headlines” pieces. The lead articles are 2500-3000 words; the regional headline pieces are 700-800. All content is subject to professional editing and technical review. Send your article proposal to news@step.ca for editorial committee consideration.

As an Editorial Committee Member:

The committee meets 3x annually to discuss story line-ups for forthcoming issues. Committee members take turns authoring the lead editorial that ties the issue content together, performing technical content reviews, and are occasionally authors. Email news@step.ca to express your interest in joining the editorial committee (2-3 opportunities annually).

Family Enterprise Advisor

The Great Wealth Transfer is Here — Prepare for Success with the Family Enterprise Advisor (FEA) Program

Only the [FEA Program](#) equips you to navigate the unique complexities inherent in advising entrepreneurial families and families of wealth. As the global benchmark in family enterprise advising, earning the FEA designation helps you stand out in this increasingly crowded field.

The FEA Program is offered in a blend of in-person and online learning, as well as an entirely virtual cohort so you can earn the FEA designation from anywhere in the world. Register now to take advantage of the early bird pricing for our Fall 2025 cohorts, plus **get a 10% discount for being a STEP Member!**



"For more than 20 years, I have been practicing tax and estate planning law and consider myself to be a trusted advisor to my clients. My clients are predominantly owner managed businesses, many of which are enterprising families. It wasn't until taking the FEA Program in 2021 that I realized that being the trusted advisor to a family enterprise means much more than just answering technical legal questions. As an FEA, I can now speak to both the technical aspects of estate planning and ask probing questions that make clients think deeper about the decisions they are making and the lasting impact they will have on the family as a system."

Elise Pulver, LLB, TEP, FEA, Principal, Wealth Planning
TD Wealth Family Office

[Learn More](#)

eNews - STEP Canada Tax Technical Committee

March 24, 2025

RE: Penalty Relief on T3 Schedule 15

The CRA has confirmed that the waiver of penalty extends to Schedule 15 of a T3 return for a trust that has a capital disposition during 2024. As such, a trust reporting a capital disposition during 2024 may file its 2024 T3 return and T3 Schedule 15 after March 31 and the CRA would waive late-filing penalties up to May 1, 2025. The CRA has also confirmed that arrears interest relief will apply up to May 1, 2025, for any outstanding tax balances in relation to a 2024 T3 return reporting a capital disposition.

STEP is continuing to follow up with the CRA to obtain confirmation that the penalty waiver will extend to other prescribed forms that may be required to be filed for 2024 by a trust with capital dispositions.

[Learn More](#)

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.

[Manager, Canadian Tax - Richter Management LTD \(Toronto, ON\)](#)

[Directeur/Directrice, Conformité Fiscale - Richter Management LTD \(Montreal, QC\)](#)

[Directeur/Directrice Sénior, Conformité Fiscale - Richter Management LTD \(Montreal, QC\)](#)

[Directeur/Directrice, Fiscalité canadienne - Richter Management LTD \(Montreal, QC\)](#)

[Vice President - Tax, Retirement and Estate Planning - CI Financial \(Toronto, ON\)](#)

[Vice-président, Fiscalité, retraite et planification successorale - CI Financial \(Montreal, QC\)](#)

Have questions?

[More on Practitioner Opportunities](#)
or
[Post an Opportunity](#)

2024-25 Program Season

Are you looking for regionally focused networking opportunities, in-depth technical content, or ways to meet your CPD requirements? Check out what your local branch/chapter is offering for the 2024-25 program season!

Thoughtfully crafted by your volunteers and supported by generous sponsors, this year’s seminar offerings will present you with numerous options to enhance your knowledge and expand your professional network.

To learn more, click the link below and select your local branch or chapter.

- [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](#)

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 2, 2025	May 2, 2025
	September 3, 2025	August 3, 2025
STEP Canada Diploma Program <i>All Courses</i>	May 26, 2025	March 1, 2025
	November 3, 2025	September 1, 2025
Essay Submission	May 1, 2025	2025 topics can be found here

Updates

DIPLOMA PROGRAM

Get Ready for the Exam with Live-Virtual Tutorials!
Preparing for the May exam? Don’t forget there are live-virtual tutorials available to help you prepare.

Check your course website for exact session dates, times, and registration links. Don't miss this opportunity to reinforce your learning and feel confident heading into the exam!

[Login to MY STEP](#)

Connect With Us on LinkedIn

Check out one of our recent LinkedIn posts:

Congratulations to our new TEPs!



Diploma Programs

Abby Huang, TEP, STEP Edmonton
Aimee Lococo-Sarabura, TEP, STEP Toronto
Alexander Ryan Lonergan, TEP, STEP Vancouver
Alina Volpov, TEP, STEP Ottawa
Amanda Forsey Taylor, TEP, STEP Atlantic Provinces
Andrew Zirone, TEP, STEP Toronto
Andrew Seong-Tae Lee, TEP, STEP Toronto
Ann Yu, TEP, STEP Toronto
Asmita Momin, TEP, STEP Toronto
Bhavin Punjabi, TEP, STEP Toronto
Brennan St Arnaud, TEP, STEP Edmonton
Brienne Cabanayan, TEP, STEP Southwestern Ontario
Camille Medina, TEP, STEP Toronto
Casey E. Clifton, TEP, STEP Edmonton
Christine MacDonald, TEP, STEP Southwestern Ontario
Ciara McIlwaine, TEP, STEP Saskatchewan
Deanna Braga, TEP, STEP Southwestern Ontario
Emma Radcliffe, TEP, STEP Vancouver
Evelyn Sylvester, TEP, STEP Toronto
Fengqi Sun, TEP, STEP Vancouver
Georgia Barnard, TEP, STEP Vancouver
Giovanni Primiani, TEP, STEP Montreal
Hailee Chun, TEP, STEP Vancouver
Hairong Chen, TEP, STEP Southwestern Ontario
Harkamal (Kam) Gurm, TEP, STEP Vancouver
Iuliia Shulakewych, TEP, STEP Ottawa
Jaclyn Gates, TEP, STEP Toronto
Jake Stephen Leveille, TEP, STEP Edmonton
Jane (Qionghui) Luo, TEP, STEP Montreal
Jason Ta, TEP, STEP Vancouver
Jermaine Shakes, TEP, STEP Southwestern Ontario
Jillian Koch, TEP, STEP Calgary
Joel Sandor, TEP, STEP Saskatchewan
Jonathan Verret, TEP, STEP Montreal
Joshua Hosein, TEP, STEP Calgary
Julianne McLaren, TEP, STEP Ottawa
Kendall Dyck, TEP, STEP Winnipeg
Ksenia Lee, TEP, STEP Edmonton
Lana Mathers, TEP, STEP Vancouver
Laurie Steele, TEP, STEP Ottawa
Leighanne Rathwell, TEP, STEP Southwestern Ontario
Lesley Bloxham, TEP, STEP Calgary
Mackenzie Berkhout, TEP, STEP Toronto
Mareike Johnson, TEP, STEP Saskatchewan
Mark Westwood, TEP, STEP Vancouver
Mary Chow Ivanovic, TEP, STEP Toronto
Meagan Jennings, TEP, STEP Ottawa
Megan Dalton, TEP, STEP Toronto
Mélanie Duciaume, TEP, STEP Montreal
Mélanie Caissie, TEP, STEP Atlantic Provinces
Michael Sims, TEP, STEP Edmonton
Michael Teng, TEP, STEP Toronto
Michaela Summers, TEP, STEP Calgary

Mudit Jain, TEP, STEP Vancouver
Nader Louhichi, TEP, STEP Montreal
Natalie Langlois, TEP, STEP Toronto
Nicole Collins, TEP, STEP Ottawa
Olivier Beaudoin, TEP, STEP Montreal
Paula Owen, TEP, STEP Calgary
Pierce Quaghebeur, TEP, STEP Calgary
Prasoon Pascal, TEP, STEP Vancouver
Priyanka Rastogi, TEP, STEP Toronto
Rebecca Sanford, TEP, STEP Calgary
Rehaaz Boodhoo, TEP, STEP Toronto
Robin Hammond, TEP, STEP Toronto
Ronny Pichardo, TEP, STEP Montreal
Ruolin (Lynn) Wang, TEP, STEP Toronto
Sabina Spahmann, TEP, STEP Vancouver
Sariyya Panahi, TEP, STEP Toronto
Scott Stoilen, TEP, STEP Vancouver
Sean Jordan, TEP, STEP Vancouver
Shawn Courtney, TEP, STEP Okanagan
Sheena Sanders, TEP, STEP Okanagan
Shehzel Saif, TEP, STEP Vancouver
Shi Wen (Maggie) Tan, TEP, STEP Toronto
Shobhit Shukla, TEP, STEP Winnipeg
Stephanie Boldt, TEP, STEP Edmonton
Stephen Guo, TEP, STEP Calgary
Sung Yan Tao, TEP, STEP Vancouver
Suzanne Smith-Demers, TEP, STEP Calgary
Thomas Irwin, TEP, STEP Vancouver
Tina Xiao Yin Xu, TEP, STEP Vancouver
Tingting Zhuang, TEP, STEP Toronto
Travis Duhn, TEP, STEP Okanagan
Tyler Powers, TEP, STEP Toronto
Usha Pawluski, TEP, STEP Edmonton
Wenke Wang, TEP, STEP Montreal
Wilson Huang, TEP, STEP Toronto
Wilson Woo, TEP, STEP Toronto
Wing Sze Tang, TEP, STEP Toronto
Yeonjun Han, TEP, STEP Vancouver
Ying Liang, TEP, STEP Montreal
Yu Qi Huang, TEP, STEP Toronto
Zhuojie Zhang, TEP, STEP Vancouver

Essay Program

Maria-Christina Spingos, TEP, STEP Toronto
Rano Daoud, TEP, STEP Ottawa

Expertise

Andrea McEwan, TEP, STEP Toronto
Darren Coleman, TEP, STEP Toronto
Ilana Lipkin, TEP, STEP Toronto
Kate Lazier, TEP, STEP Toronto
Kody Wilson, TEP, STEP Ottawa
Nicole Stevens, TEP, STEP Saskatchewan
Zachary Bronstein, TEP, STEP Toronto

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 February and March of 2025.

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

Want to see 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

Searchable Resource Tool (SRT)

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 2024 National Conference and the Canada-US Cross-Border Conference.

Members can access the SRT by logging into their MY STEP account.



[Login to MY STEP](#)

Reminders

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.

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