

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!

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Federal Budget Live Webcast

Complimentary for STEP Members

Thursday, April 20, 2023

12:00pm - 1:00pm EDT

The Federal Budget, released on March 28, 2023, contained several important proposed measures in relation to potential exit options for Canadian business owners. STEP Canada's Tax Technical Committee will be hosting a webcast with a live Q&A session on **2023 Federal Budget Tax Highlights**. While the session will briefly touch on the various tax changes proposed by the Budget, it will focus primarily on:

- proposed amendments to section 84.1 in respect of intergenerational business transfers; and
- proposed measures for a sale of a business to an Employee Ownership Trust.

Our panelists, **Ian Lebane**, **Yogesh Bhatella**, **Joan Jung**, and **Kenneth Keung**, will answer delegate questions LIVE after the broadcast. Ask your questions in the chat room and they will be addressed at the end of the webcast.

Details & Registration

2023-24 Membership Renewal



If you have not yet renewed your annual membership, this is a friendly reminder to submit payment at your earliest convenience. All STEP Canada membership renewals were due by **April 1, 2023**.

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

STEP Canada is pleased to offer its members in good standing preferred registration rates to the 25th National Conference, June 19th-20th, 2023. Be sure you renew your membership prior to registering to be eligible for the discounted rates.

Questions about membership or renewals can be sent to memberservices@step.ca.

Click here to login and renew today

Two-Day Online Course Wrap Up

With 6 weeks of sessions, over 450 delegates, 9 dedicated sponsors, and 4 incredibly knowledgeable course leaders, the first ever two-day online course, "**Canada/US Cross-Border Estate Planning**", has reached the end of its run.

This complex and sometimes difficult topic is one that affects many practitioners, but with the guidance and expertise of our extraordinary course leaders, the presentations delivered were both detailed and in-depth but explained with simplicity using numerous examples and engaging question and answer

periods. Based on your feedback, we can agree that **Leslie Kellogg, Britta McKenna, Carol Fitzsimmons, and Paul Gibney**, hit a home run. We send an enormous thank you to our course leaders for all their hard work in putting together this unique course.

We are proud to share some feedback we received from our delegates:

“I don't normally leave any comments but I was so thoroughly impressed with this course. The content and speakers were exceptional. It's difficult to find courses that focus on cross-border tax that have sufficient depth and complexity. These sessions were excellent. Lots of content, the slides will be a useful tool/resource in the future and the concepts were complex and technical. It was exactly what I was looking for. Thank you so much for putting this on.”

“This was one of the most useful and interesting courses I have ever taken in my 29-year career. The detailed information coupled with experiential examples of the presenters was exactly what I had hoped for. Thank you to all for your time and efforts.”

“Best course that I've attended in many years, the presenters gave great practical comments which were very useful.”

“This was one of the very best courses that I have attended in all of my career (the past 25 years).”

“I was very impressed by the knowledge level of each presenter and the very clear way in which they explained concepts.”

STEP 18th Annual Private Client Awards

**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, the STEP Private Client Awards are seen as the hallmark of quality within the private client industry. Don't miss your opportunity to be recognized and celebrated amongst your peers.

Entries will close on April 14, 2023. The finalists will be announced in July, and the winners will be announced at the awards ceremony on September 21, 2023 in London, UK.

[More Information](#)

eNews Updates

March 20, 2023

RE: Underused Housing Tax (UHT)

[Click here for more information](#)

March 28, 2023

RE: Transitional Relief for 2022 Underused Housing Tax Filing and Payment Obligations

[Click here for more information](#)

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.

Senior Advisor, Financial, Tax, and Estate Planning - Desjardins (Toronto or Ottawa, ON)

Have questions?

[More on Practitioner Opportunities](#)

or

[Post an Opportunity](#)

Education Centre

Exam Sittings & Essay Submission Dates

Education Program	Exam/Essay Dates	Registration Deadlines
CETA 1	Accessible at any time	Exams must be completed within 6 months of registration
CETA 2-4	June 1, 2023 September 6, 2023	May 1, 2023 August 6, 2023
STEP Canada Diploma Program	November 6, 2023	September 6, 2023
Essay Submission	May 1, 2023 October 1, 2023	*2023 topics can be found here

Updates

CETA

CETA 2-4 September Examination Date Change

Please note that the September examination date has been moved to accommodate the long weekend. The exam will now be written on September 6, 2023.

Diploma Program

Instructor tutorials will be taking place for each of the diploma courses starting the end of April and running through early 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 and attendance is strongly encouraged. The tutorials will be recorded for those that cannot attend.

Connect With Us on LinkedIn

A recent post from the STEP Canada LinkedIn corporate page:

STEP Canada is thrilled to announce the latest recipients of the prestigious Trust and Estate Practitioner (TEP) designation. The below members were granted the designation on April 3, 2023.

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](#)

The graphic features a blue background with a network of white lines. On the left, a yellow banner reads "Congratulations to our new TEPs!". Below this, two columns list names and titles: "Expertise" (Alexander Demner, Geoff Garland, Maya Gordon, Richard Eisenbraun, Ruphina Kaulback) and "Diploma Programs" (Kristie Smith, Lindsay Baker). The STEP Canada logo is in the top right corner.

Want to see 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.

Follow STEP Canada's corporate page.

You can find the link to your local branch/chapter group on the STEP Canada corporate page.

Need help? View the [LinkedIn Cheat Sheet](#).

Upcoming Branch & Chapter Events

Click to view the entire upcoming schedule for the 2022-23 Branch/Chapter Bundles.

Thur April 20	STEP Canada Federal Budget Live Webcast 12:00pm - 2:00pm ET Online - pre-registration required	Wed May 4	STEP Calgary ABM, Seminar & Social Event 4:00pm - 6:00pm MT Ranchmen's Club, Calgary - pre-registration required
Tues May 9	STEP Montreal ABM & Seminar 11:00am - 2:00pm ET Osler, Hoskin & Harcourt, Montreal - pre-registration required	Mon April 3	STEP Okanagan ACM 3:00pm - 3:15pm PT BMO, Kelowna - pre-registration required

Reminders

Most **STEP Canada staff** work from home 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.

[Quick Links](#)

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[STEP Member Directory](#)

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Got Questions? Please Contact Us | Phone: 416-491-4949 ext.221 | Toll-free: 1-877-991-4949 | step.ca