

Hey member! With access to our monthly **STEP Insider**, you receive the latest news about upcoming CPD and networking events, practitioner opportunities, education updates, and more!

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Looking to see what events are taking place this month? Scroll down!



[NEW STEP Canada Website](#)

[STEP Worldwide Member Directory](#)

[STEP Worldwide Website](#)

[Practitioner Opportunities](#)

STEP Membership Renewals for 2026-27

Due Date: April 1st, 2026

Haven't renewed your membership yet? Login to your MY STEP account today to get your membership back into good standing!

Renewing your membership maintains your access to exclusive STEP member benefits, including preferential rates for technical seminars and conferences, use of the prestigious TEP designation (if applicable), and access to your classroom (if applicable).

Thank you to the over 80% of STEP Canada members who have already renewed their membership and confirmed their commitments for 2026-27.



[Renew Your Membership Today](#)

STEP Canada's 28th National Conference

Building Connections, Sharing Knowledge

SOLD OUT: June 1-2, 2026 | In-Person, Toronto

REGISTRATION OPEN: June 8, 2026 | Online On-Demand Begins

Looking for a convenient and easy way to earn your CPD? Look no further! Starting June 8, you'll have on-demand access to all 19 conference sessions, so you can watch when it works best for you. Experience this year's exceptional program that will unpack current developments, emerging trends, and practical strategies shaping the trust and estate landscape.

"Excellent content and a great way to stay up to date on an annual basis."



[Register for Online On-Demand Access](#)

Refreshed Marketing Brochures for Clients

As part of a new national campaign, STEP Canada is aiming to help Canadians identify and understand the TEP designation so they can make informed decisions with confidence.

These marketing brochures, updated in 2025, are designed for you to display in your office or provide to your clients in order to make complicated matters easier for them to understand. They are available only to members of STEP Canada, and all members were sent a sample of each brochure with their physical member renewal kit.



For the cost of printing, only \$5 CAD for a pack of 10 brochures (+ tax and shipping), these brochures provide excellent value for promoting your specialized skillset and supporting clients.

[Learn More About Our Brochures](#)

STEP Starts Here - Getting Involved

In this section, volunteers from across the country will share how they took the first STEP to get involved - and where it has led them.



Chris Delaney, TEP
Edward Jones Canada
STEP Southwestern Ontario

"I joined STEP in 2013, and what began as simple curiosity quickly turned into one of the most meaningful professional commitments I've made. Early on, I became involved with my local branch executive, and that decision opened the door to a community of thoughtful, generous professionals who care deeply about their work and the families they serve.

Through that local involvement, I had the opportunity to build relationships with TEPs across a range of disciplines. Those conversations—often informal and collaborative—have had a direct impact on how I approach client work. They broadened my perspective and raised the standard of advice I strive to deliver. Just as importantly, they gave me a much clearer understanding of what STEP truly represents beyond the designation itself.

That experience naturally led to further involvement at the national level. I was fortunate to contribute to STEP Canada through the Membership Services Committee and later as Deputy Chair and Chair of the National Student Liaison Committee.

Being part of those conversations—helping shape how STEP supports both current and future members—was both energizing and humbling. It provided a deeper appreciation for the care and intention behind the member experience across the country provided by the membership and the wonderful people at STEP National head office.

More recently, my involvement has extended globally through STEP Worldwide's Special Interest Groups, particularly the Business Families SIG. This work aligns closely with my professional focus and has connected me with peers around the world who are equally committed to advancing how we advise family enterprises. I was honoured to be re-elected to the Steering Committee, where we collaborate to develop programming and thought leadership for members globally, including contributions to STEP's Global Congress.

Looking back, what stands out most is not just the professional development—though that has been significant—but the relationships. STEP has introduced me to a network of colleagues I trust, learn from, and genuinely enjoy working with. Many of those connections have become lasting friendships.

What started as an introduction to a professional body has evolved into a community that continues to shape both my work and my perspective."

Chris is currently the Chair of STEP Canada's Student Liaison Committee, and a contributing member to STEP Canada's Member Services Committee and the global Business Families Special Interest Group Steering Committee. Chris has also previously served as the Chair, Deputy Chair, Member Services Officer, Program Officer, and Student Liaison Officer for the STEP Southwestern Ontario Chapter.

There are many ways to deepen your involvement with STEP while building your expertise and expanding your network. Attend a technical seminar, connect at a networking event, contribute your knowledge as a speaker, or make an impact by volunteering on a committee.

For more information on how to engage with STEP, reach out to your local Member Services Officer.

Are you interested in sharing your volunteer journey with STEP members and encouraging others to become involved? Send us an email with your story to memberservices@step.ca.

[Learn More About Volunteering With STEP Canada](#)

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.

[Learn More](#)



Looking for Accredited CPD? We've Got You Covered

Local and National STEP Canada events are designed to meet the continuing education requirements for provincial law societies, governing bodies, and professional associations by offering unique and timely technical content. Members can also fulfill their STEP CPD requirements by attending seminars that align with their reflective development goals.

STEP Canada applies for accreditation, where required, for all relevant paid technical seminars to support its membership and their professional outcomes. [Visit the FAQ section](#) on our website to learn more about CPD accreditation for STEP Canada's events.



If you have questions relating to your CPD certificates or would like more information, please email memberservices@step.ca.

STEP CPD Learning Course: Digital Assets

Digital assets are now part of everyday life and increasingly form a key part of clients' estates. From cryptocurrencies and cloud storage to social media accounts and domain names, estate practitioners need the skills to manage these assets confidently and securely. This course will enable you to confidently navigate digital assets in estate planning and administration with the knowledge and skill essential for today's digital world.

Discounts are available for STEP members and Employer Partners.



[Learn More About STEP's CPD Course](#)

STEP Canada National Webcasts - Available On-Demand

Registration is still available for the two recent STEP Canada National Webcasts:

- **2025 Federal Budget Webcast**
- **Beyond the Indian Act: A Primer on Estates, Succession, Tax and Trusts for Indigenous Clients**

The on-demand version of these broadcasts will be available until June 30, 2026. These valuable webcasts were broadcast in English, and are offered free of charge for STEP Canada Members and Students.



Upcoming Events Across the Country

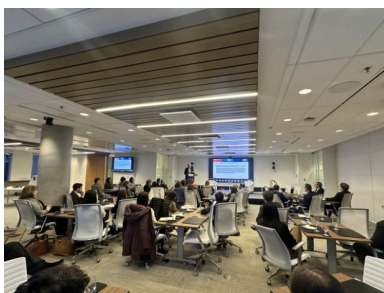
Registration Now Open

Please note that only Full Members that have renewed their memberships for 2026-27 are eligible to take part in their Annual Branch/Chapter Meetings.

STEP Okanagan April 28, 2026 3:00pm - 5:00pm PT <i>Branch Bundle Seminar</i>	STEP Montreal May 5, 2026 3:00pm - 7:00pm ET <i>Seminar & Cocktail Reception</i>	STEP Winnipeg May 5, 2026 12:00pm - 1:30pm CT <i>Branch Bundle Seminar</i>
<u>Annual Chapter Meeting & "Snowbirds: Considerations for Those Flying South"</u>	<u>Annual Branch Meeting & "Tax Potpourri, and Legal and Tax Considerations with Respect to Spousal Trusts and Lifetime Trusts"</u>	<u>Annual Branch Meeting & "Between a Rock and a Hard Place: Navigating Taxation and Litigation in Estate Administration"</u>
STEP Ottawa May 6, 2026 4:00pm - 5:30pm ET <i>Branch Bundle Seminar</i>	STEP Southwestern Ontario May 6, 2026 3:00pm - 5:00pm ET <i>Chapter Bundle Seminar</i>	STEP Saskatchewan May 6, 2026 3:00pm - 5:00pm CST <i>Branch Bundle Seminar</i>
<u>Annual Branch Meeting & "Premortem Tax Planning"</u>	<u>Annual Chapter Meeting & "Elder Care"</u>	<u>Annual Branch Meeting & "US Cross Border Properties and Estates"</u>
STEP Toronto May 7, 2026 4:00pm - 6:00pm ET <i>Branch Bundle Seminar</i>	STEP Edmonton May 7, 2026 11:45pm - 1:30pm MT <i>Branch Bundle Seminar</i>	STEP Calgary May 7, 2026 4:00pm - 6:00pm MT <i>Social Event</i>
<u>Interactive Case Study Workshop</u>	<u>Annual Branch Meeting & "The Bold Family: Navigating Complexity with Collaborative Wisdom"</u>	<u>Annual Branch Meeting & "Speed vs. Safety: Thinking Through Risk vs. Reward When Adopting AI Tools"</u>
STEP Atlantic May 7, 2026 2:30pm - 4:30pm AT <i>Branch Bundle Seminar</i>	STEP Atlantic May 7, 2026 5:00pm - 7:00pm AT <i>Social Event</i>	STEP Vancouver May 7, 2026 3:00pm - 5:00pm PT <i>Branch Bundle Seminar</i>
<u>"STEP by STEP: A Collective Case Study on Business Transitions"</u>	<u>Annual Branch Meeting & Sparkling Reception</u>	<u>Annual Branch Meeting & "Year in Review"</u>

Save The Date - Registration Opening Soon

STEP Toronto May 11, 2026 11:45am - 1:00pm PM <i>Members Only</i>	STEP Toronto May 12, 2026 5:00pm - 7:00pm ET <i>Social Event</i>
<u>STEPping out to Lunch</u>	<u>Annual Branch Meeting & Year End Social Event</u>



Branch and Chapter Bundles offer can't-miss networking opportunities and valuable CPD seminars, designed to support professional growth and connections.

If you haven't registered yet, not to worry - there is still time! Whether you are looking to expand your knowledge or connect with fellow trust and estate professionals, there is something for everyone in this season's schedule. We hope to see you at an event before the season is finished!

Branch Bundle registrants will have access to online on-demand replays (where applicable) until December 31, 2026.

Save the Date for the Next STEP Canada National Webcast

On **June 18, 2026**, STEP Canada and the CRA will be jointly presenting a national webcast on the new Voluntary Disclosures Program (VDP), effective October 1, 2025.

This webcast will be of interest to trust and estate practitioners, tax advisors, and professionals advising executors, trustees, beneficiaries and high net worth individuals.

Details and registration information will be available shortly.

Education Centre

Education Program	Exam/Essay Date	Registration Deadline
CETA 1-4	All CETA exams are available online on-demand. Must be completed within 12 months of registration.	Registration open on a rolling basis for on-demand exams
NEW: Investment Basics for Fiduciaries (IB) 1-4	Assessments are available on-demand. Final course assessment must be taken within 12 months from enrollment.	Registration is open on a rolling basis.
STEP Canada Diploma Program (All Courses)	November 2, 2026	September 1, 2026
NEW FOR FULL MEMBERS: Taxation of Trusts & Estates (Standalone course)	November 2, 2026	September 1, 2026
Essay Submission	May 1, 2026	2026 topics can be found here

Education Program Updates

Diploma Program:

An email was sent out to all students writing the May exam with important date reminders regarding instructor tutorials, Instructor Q&A Board dates, and deferral timelines. These dates are also noted on the course platform.

Important Information for May Diploma Exams:

Further to the notices sent on (**February 20 and April 6**), STEP Canada Diploma exams will be accessed on a new platform which requires a Google Chrome extension download. The system demo and new exam procedures are now posted on the course platforms. [All students](#) should complete the system demo.

The following documents are posted under the EXAM section of your classroom, please read them carefully and familiarize yourself with the exam administration process and procedures.

- System Demo for Exam
- Google Chrome extension download
- Exam Procedures and Instructions
- Exam & Demo – Step-by-Step Instructions

Single Course Registration for Taxation of Trusts & Estates

Full members can now access the second course in the STEP Canada Diploma Program, Taxation of Trusts and Estates. [Login to your MY STEP account](#) to register for this course. This comprehensive course offers you the opportunity to prepare with tax basics or start directly with the trust and estate tax topics. A live virtual case study series and instructor resources are available. If you have questions, reach out to education@step.ca.

NEW Certificate Program: Investment Basics for Fiduciaries (IB)

Designed for trust and estate professionals, this program provides essential investment knowledge for those that administer estates, trusts, and manage the financial affairs of incapable persons. By connecting investment fundamentals to real-world fiduciary decision-making, this course empowers professionals to navigate their responsibilities with confidence and compliance. Registration is on a course-by-course basis. [Read our brochure to learn more.](#)

Connect With Us on LinkedIn

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**

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

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

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.

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

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