

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's branches and chapters remain committed to creating opportunities for our members to expand their knowledge and professional networks, and the local program committees are hard at work creating an exciting lineup of unique and timely technical seminars for the 2023-24 education season!

Launching soon, the 2023-24 Branch/Chapter Bundles will provide six seminars worth of in-depth content, valuable collaboration, networking opportunities, and accessible continuing education (CPD/CE) credits.

Watch your inbox over the next few weeks for important announcements and program information.

We can't wait to see you again!

18th Annual STEP Private Client Awards

Join STEP in-person on September 21st, 2023, at the London Hilton on Park Lane in London, UK for the 18th annual STEP Private Client Awards!



Best of luck to our four Canadian finalists:

TD Wealth Private Trust, Tax Services
Accountancy Team of the Year (large firm)

Cindy Radu Advisory
and
Crysalia
Family Business Advisory Practice of the Year

Our Family Office Inc.
Multi-Family Office Team of the Year

[Click here for details and to book a table](#)

25th National Conference CE/CPD Certificates

For online delegates, or those who wish to rewatch or watch any concurrents they missed, all sessions have been archived and are now available for on-demand viewing at your leisure. Delegates can find all sessions available through the 25th National Conference App. The maximum CPD available is 20.50 hours for all 17 sessions.

Please note that accreditation is currently pending with FP Canada, and CPD/CE certificates are scheduled to be sent to delegates in mid-August 2023.



[CPD Accreditation List](#)

[Details and Registration](#)

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.

[Director, Tax and Estate Planning - IGM Financial, Mackenzie Investments \(Toronto, ON\)](#)

[Trust Officer - BMO Financial Group, Wealth Management Division \(Vancouver, BC\)](#)

[Senior Auditor Positions - Canada Revenue Agency \(AB, BC, MB, SK\)](#)

Have questions?

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

Education Centre

Education Program	Exam/Essay Date	Registration Deadline
CETA 1	Accessible at anytime	Exams must be completed within 6 months of registering
CETA 2-4	September 6, 2023 March 1, 2024	Registration Closed February 1, 2024
STEP Canada Diploma Program	November 6, 2023 May 29, 2024	September 6, 2023 March 29, 2024
Essay Submission	October 1, 2023	

Updates

Diploma Program

The first round of peer learning sessions will take place the week of September 11th, 2023. The second peer learning sessions are scheduled for the week of September 25th, 2023.

Students should login to their course website to register for each session and review the case study and questions that will be discussed.

Reminder that enrollment for the November 6th exam date closes on September 6th, 2023. Please register online via your MY STEP account.

CETA Program

Reminder that the CETA 2-4 exam date is September 6th, 2023. Good luck to all students writing on this date. Please check your classroom portal for exam information and procedures.

Connect With Us on LinkedIn

Latest 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 in July and August, 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

Congratulations to our new TEPs!

Diploma Programs

- Alexander Anastasopoulos, TEP, STEP Toronto
- Athena McBean, TEP, STEP Toronto
- Christopher Gorman, TEP, STEP Okanagan
- Daniel Perras, TEP, STEP Toronto
- Harvey Agustin, TEP, STEP Calgary
- Hui Che, TEP, STEP Vancouver
- Irene Bihari, TEP, STEP Vancouver
- Jacqueline Ho, TEP, STEP Vancouver
- Jacqueline Ruderman, TEP, STEP Toronto
- Joshua Wood, TEP, STEP Ottawa
- Juan (Jane) Yi, TEP, STEP Toronto
- Julia Norman, TEP, STEP Okanagan
- Karen La Caprara, TEP, STEP Toronto
- Kira Domratchev, TEP, STEP Toronto
- Kristen Kress, TEP, STEP Edmonton
- Lianne Bourdages, TEP, STEP Okanagan
- Lifei Zhu, TEP, STEP Montreal
- Lin Zhang, TEP, STEP Vancouver
- Linjun Huang, TEP, STEP Calgary
- Madison Donovan, TEP, STEP Atlantic
- Margaret Bosch, TEP, STEP Southwestern Ontario
- Masha Brar, TEP, STEP Toronto
- Matthew Kueneman, TEP, STEP Southwestern Ontario
- Megan Lambert, TEP, STEP Toronto

Essay Program

- Mitchell Shields, TEP, STEP Toronto
- Ryan Devereux, TEP, STEP Southwestern Ontario
- Sanjeevan Rasathurai, TEP, STEP Toronto
- Sayuri Kagami, TEP, STEP Toronto
- Shek Long Chan, TEP, STEP Vancouver
- Spencer Keys, TEP, STEP Vancouver
- Stanley Wang, TEP, STEP Toronto
- Stephanie Dwyer, TEP, STEP Calgary
- Sukhvinder Chahal, TEP, STEP Vancouver
- Thomas Miller, TEP, STEP Vancouver
- Tianyou Zhang, TEP, STEP Vancouver
- Toban de Rooy, TEP, STEP Vancouver
- Tom Donston, TEP, STEP Toronto
- Tomasz Panek, TEP, STEP Toronto
- Wayne De Boer, TEP, STEP Calgary
- Yinghui (Chloe) Meng, TEP, STEP Toronto
- Zhen Xiong, TEP, STEP Toronto
- Zhuolin (Joyce) Xiao, TEP, STEP Toronto

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.

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 corporate page](#)

Upcoming Branch & Chapter Events

Save the dates and watch your email, more information will be available soon.

STEP Calgary

September Showcase
September 14, 2023
4:00pm - 6:00pm MT

"Trust, Tips & Traps"

STEP Edmonton

September Showcase
September 21, 2023
4:00pm - 6:00pm MT

"Dealing With Difficult
People: Let Us Share
the Pain"

STEP Vancouver

Seminar + Social
September 21, 2023
2:00pm - 5:00pm PT

"The Power and the
Glory: What powers
do fiduciaries have,
and how are those
balanced and
administered?"

STEP Winnipeg

September Showcase
September 28, 2023
3:30pm - 6:30pm CT

"International Issues in
Estate Planning and
Administration"

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

[Advising Families Canada](#)

[STEP Member Directory](#)