



E-Newsletter Vol. 12 | Issue 12 | December 10, 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!

Coming Soon: STEP Canada Full-Day Course

Advising Executors From Death Certificate to Clearance Certificate

Enhance Your Expertise in Estate Management: A Specialized Full-Day Course for Tax and Estate Professionals!

Tailored for tax and estate professionals, this comprehensive course offers an in-depth exploration of estate management, empowering you to provide exceptional guidance to your clients. From initial administration tasks such as organ donation and funerals to intricate issues like multi-will management and asset distribution, acquire the comprehensive knowledge necessary. Gain a deep understanding of tax filings, probate applications, and the safeguarding of assets while addressing liabilities. Elevate your ability to confidently navigate beneficiary issues, compensation, and court proceedings.

Course curriculum authored by:



Michelle D. Coleman
CPA, CA, CEA, TEP: Edmonton
MNP LLP



Kristina Hyland
JD, TEP, Toronto
TD Wealth



Susannah Roth
LLB, TEP, Toronto
RBC Wealth Management,
Royal Trust

In addition to the three subject matter experts above, the curriculum has received contributions from additional experts, including a Litigator, a Designated Financial Planner (for insurance and registered plans), and a Quebec Notary. Senior practitioners with specialized experience advising executors will present the full-day course and guest appearances by one or two original authors (where possible). Be sure to save the date for the course date in your region:

STEP Winnipeg: [Wednesday, Jan 8 \(NOW OPEN\)](#)

STEP Ottawa: [Wednesday, Jan 15 \(NOW OPEN\)](#)

STEP Okanagan: [Tuesday, Jan 21 \(NOW OPEN\)](#)

STEP Vancouver: [Thursday, Jan 23 \(NOW OPEN\)](#)

STEP Toronto: Thursday, Feb 6

STEP Edmonton: Wednesday, Feb 12

STEP Calgary: Wednesday, Feb 19

STEP Saskatchewan: Wednesday, Feb 26

STEP Southwestern Ontario: Tuesday, Mar 4

STEP Atlantic: Thursday, Mar 6

STEP Montreal: Thursday, May 8

Watch your email and step.ca for registration information. In-person capacity limits will be enforced; register early to avoid disappointment!

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).

Save the Date: 27th Annual National Conference

Mark the date in your calendar!

Planning is underway for STEP Canada's 27th Annual National Conference, and we hope to see you in June 2025 taking advantage of great technical sessions, networking, and much more.

Monday, June 16 & Tuesday, June 17, 2025
at the Sheraton Centre Toronto Hotel

Monday, June 23, 2025
On-Demand Replays

Watch step.ca for more information to be released in January.



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 now offered in three annual cohorts: two with a blend of in-person and virtual learning, and one entirely virtual so you can earn the FEA designation from anywhere in the world. Register now to take advantage of early bird pricing, plus a 10% discount for STEP Members!



"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](#)

CPD Update

The Member Services Team is working to send out all remaining CPD certificates for 2024 programs, including the 2023-24 Branch/Chapter Bundles, the 2024 National Conference, the STEP Canada-USA Cross-Border Conference, and the September-December sessions of the 2024-25 Branch/Chapter Bundles. All certificates will be sent before **December 31, 2024**.

If you have questions or concerns relating to your CPD certificates, please email memberservices@step.ca.

Did you know that as part of STEP's CPD policy, all members must undertake a minimum of one ethics activity annually? STEP has numerous resources to assist you in meeting your requirement:

- [View videos on the Code of Professional Conduct](#)
- [Watch the 'Learning from Complaints' webinar](#)

Or, search through the STEP CPD Knowledge Hub for articles, presentations, and more via the link below.

[STEP CPD Knowledge Hub](#)

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](#)

Searchable Resource Tool

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 2023-24 Branch/Chapter Bundles and the 2024 National Conference.

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



[Login to MY STEP](#)

STEP Global Congress 2025

You can now book tickets for the next STEP Global Congress, which will be taking place in Rome, Italy on February 25 and 26, 2025. Congress will address the challenges and opportunities presented by the next generation of wealth holders; the fight against economic crime; and the debate over implementing a global wealth tax, offering diverse perspectives on potential impact and feasibility.

[Details & 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.

[Wills, Estate & Trusts Lawyer - Pallett Valo LLP \(Mississauga, ON\)](#)

[Estate & Trust Consultant - Scotiabank \(Vancouver, BC\)](#)

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	March 3, 2025	February 3, 2025
STEP Canada Diploma Program All Courses	May 26, 2025	March 1, 2025
Essay Submission	May 1, 2025	2025 topics will be available in January

Updates

DIPLOMA PROGRAM

All grades from the November 4 exam are now posted in your MY STEP account under "My Courses & Marks." Registration for the Spring 2025 term (exam date: May 26, 2025) is open. Select "Diploma Program Registration" to enroll.

Congratulations to students who have successfully completed the Diploma Program! Certificates will be mailed in early February 2025. Please ensure your preferred mailing address is updated in your profile by December 20, 2024.

A reminder for Diploma graduates: To obtain your TEP designation, submit your Full Membership Upgrade Application to education@step.ca. The procedures and application form are available in your classroom and were also emailed to you. The next STEP Worldwide Application Review Meeting is scheduled for February 3, 2025.

Connect With Us on LinkedIn

Check out one of our recent LinkedIn posts:



Grade Release Day!

As of today, December 4, all students enrolled in the STEP Canada Diploma Program in Trusts and Estates can login to their MY STEP account to view their grades under the "My Courses & Marks" section.

Congratulations to all students that are moving on to the next course, and those that are now eligible to apply for the TEP designation!

Click here to sign in -> https://step.ca/sign_in

Registration is open for students to book their next course, and will close on March 1, 2025 for the May 26, 2025 exam date.

Are you interested in finding out more about our Diploma Program? Click here -> <https://step.ca/diploma>

#STEP #STEPCanada #STEPCanadaDiplomaProgram #TrustsandEstates #Education #Membership

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



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.

Quick Links

[STEP Canada Website](#)

[STEP Member Directory](#)

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