

Newsletter Vol. 13 | Issue 12 | December 9, 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](#)

[STEP Worldwide Website](#)

[Practitioner Opportunities](#)

2025 Founder's Awards - Canadian Recipients



Kenneth Keung, TEP
Doane Grant Thornton LLP
STEP Vancouver



Nathalie Marchand, TEP
Miller Thomson LLP
STEP Montreal



Ruth Spetz, TEP
Borden Ladner Gervais LLP
STEP Calgary

STEP Canada is proud to congratulate Kenneth Keung, Nathalie Marchand, and Ruth Spetz on their well-deserved recognition as 2025 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 Kenneth, Nathalie, and Ruth for their continued support of STEP, and congratulating them on this remarkable achievement.

[Learn More About the 2025 Recipients](#)

STEP Canada National Webcast

**Beyond the Indian Act:
A Primer on Estates, Succession, Tax and Trusts for Indigenous Clients**

Wednesday, January 21, 2026 @ 12:00pm EDT

Join us for an engaging webcast exploring how Indigenous, federal, and provincial/territorial laws intersect in wills and estate planning. Gain practical insights into modern treaties and self-government agreements, taxation on-reserve, the Indian Act, and settlement trusts to better serve Indigenous clients and communities.

The Indigenous Peoples of Canada have a unique relationship with Canada and its provinces, which can impact the wills and estates of their members. This important session will discuss:

- A jurisdictional overview of succession/incapacity law addressing modern treaties, self-government agreements, the Indian Act, and provincial/territorial law.
- Taxation on death of on-reserve and off-reserve interests.
- Estate administration under the Indian Act (and the effect of land codes, family homes on reserve, etc., on succession).
- Succession & incapacity planning with property on-and-off reserve.
- The settlement trust (with an emphasis on per capita distributions and individual interests, and impact of death).

This valuable webcast will be broadcast in English, and is offered free of charge for STEP Canada Members and Students.

Details & Registration

Save the Date: STEP Canada's 28th National Conference

Mark the date in your calendar!

Planning is well underway for STEP Canada's 28th National Conference, and we hope to see you in June 2026 taking advantage of the great technical sessions and networking opportunities!

Monday, June 1 & Tuesday, June 2, 2026
at the Sheraton Centre Toronto Hotel

Monday, June 8, 2026
On-Demand Replays

Watch your email and step.ca for details and registration to be released in January.



Registration Open for 2025-26 Program Season Events

Join Us for an Exciting 2025-26 Program Season!

Your branches & chapters are proud to share the lineup of interesting and engaging events for this program season. Local volunteers have curated a fantastic selection of can't-miss networking opportunities and valuable CPD seminars, designed to support your professional growth and connections!

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 can't wait to welcome you to these events!

For more information, click the link below and select your branch or chapter.



STEP's Digital Asset Learning Opportunities

STEP Webinar Week: Exploring Digital Assets



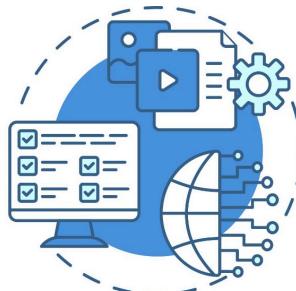
As digital assets, and especially crypto-assets, become a staple of modern private wealth and a mainstream component of client portfolios, they introduce complexities, and opportunities, for trusts, estates, and private wealth professionals.

From **January 12-26, 2026**, get ready to dive into the fast-moving world of digital assets with industry experts!

Designed to help you better understand the landscape of digital assets, and translate that knowledge into tangible, client-focused value. Registration is complimentary for STEP members and available for individual webinars or the full series. Each webinar will be recorded and available to view on-demand.

[Details & Registration](#)

STEP CPD Learning Course: Digital Assets



Confidently navigate digital assets in estate planning and administration with the knowledge and skill essential for today's digital world.

This course, run by the Global STEP education training partner CLTI, will equip you with the practical tools and expert insight to meet growing client demand, support families during incapacity or bereavement, apply consistent best-practice approaches, and minimise risk by ensuring digital assets are properly identified, valued, and transferred.

An optional end of course assessment comprising 10 multiple-choice questions is included, and upon successful completion, you will receive a certificate to recognise your achievement.

Discounts are available for STEP members and STEP Employer Partners.

[Details & Registration](#)

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.



Alysha Tse, TEP
Richardson Wealth
STEP Vancouver

"I pursued the TEP designation because I wanted to build a career grounded in technical excellence and supported by a community that understands the complexity of modern estate, trust, and multi-disciplinary planning. TEP quickly became the designation I value most. It has shaped the way I approach problems, collaborate with other professionals, and guide families through important and often sensitive decisions. The learning journey was rigorous, and it created a foundation that continues to influence my practice every day."

"My involvement with STEP has also opened doors I never anticipated. The relationships I've built with practitioners across Canada and internationally have become a defining part of my professional life. Having the opportunity to represent Canada on a STEP Worldwide special operations project was an honour. Contributing to work that will help guide how other

jurisdictions structure their operations offered valuable perspective and was an exceptional learning experience.

My ongoing work with STEP Vancouver has been equally meaningful. Serving on the board has given me a front-row seat to the energy and dedication within our local branch. I've had the chance to help shape programming, strengthen member engagement, support the next generation of advisors, and foster collaboration across the estate-planning community in Vancouver.

I began volunteering to give back to the community that supported my growth, and it remains one of the most rewarding decisions I've made. Engaging with students, emerging practitioners, and experienced leaders reinforces how important it is that we continue investing in one another. For anyone considering getting involved, I would encourage you to take the leap. Even a small commitment can lead to meaningful relationships, new opportunities, and a stronger sense of connection within a community that elevates our entire profession."

Alysha is currently Deputy Chair and Sponsorship Officer for the STEP Vancouver Branch, having previously volunteered as the Branch Secretary, Program Officer, Member-at-Large, and Student Liaison Officer. Alysha has also represented Canada on a STEP Worldwide Council special operations project, contributing her expertise to global initiatives in trust and estate planning.

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.

Find Your Local Board Members

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.

Did you know we apply for CPD accreditation from these bodies?

- Alberta Insurance Council (AIC) - *if applicable**
- Canadian Investment Regulatory Organization (CIRO) - formerly MFDA
- FP Canada
- The Financial Services Regulatory Authority of Ontario (FSRA)
- The Institute for Advanced Financial Education (IAFE)
- Insurance Council of Manitoba (ICM) - *if applicable**
- Law Society of British Columbia (LSBC)
- Law Society of Ontario (LSO) - *if applicable***

**if seminar is based on insurance*

***only for professionalism hours*

The following bodies recognize STEP activities for continuing education credits with no formal accreditation application required, and the standard issued CPD certificate for verification of hours will suffice for your records:

- Barreau du Québec and the Chambre des notaires du Québec
- Chartered Professional Accountants (CPA)
- Law Society of Alberta
- Law Society of British Columbia - *for substantive hours*
- Law Society of Manitoba
- Law Societies of Nova Scotia, New Brunswick, Prince Edward Island, and Newfoundland and Labrador
- Law Society of Ontario - *for substantive hours*
- Law Society of Saskatchewan
- Society of Trust and Estate Practitioners (STEP)

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

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 & Estates Lawyer - Linmac LLP \(Toronto, ON\)](#)

Have questions?

[More on Practitioner Opportunities](#)

or

[Post an Opportunity](#)

Outreach & Development: Find Us in Your Community

Date & Location

February 19 - 20, 2026
Vancouver

Event & Location

The Estates, Trusts and Pensions
Journal Conference at the Peter A.
Allard School of Law, UBC

Type of Outreach

Sponsor, Exhibitor

We look forward to engaging with our trust and estate community at courses and industry events.



Photos above from the University Lunch & Learn on October 9th at the Lincoln Alexander School of Law at Toronto Metropolitan University. Thank you to STEP members Susannah Roth TEP, Kate Stephens TEP, and Elizabeth Bozek TEP, for sharing your expertise with the next generation of practitioners.



Photos above from the University Lunch & Learn on October 29th at the Peter A. Allard School of Law at University of British Columbia. Thank you to STEP members Litza Anderson TEP, Dwight Dee TEP, Jo-Anne Stark TEP, and Adam Hofri-Winogradow TEP, for sharing your expertise with the next generation of practitioners.

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	CETA exams will be on-demand starting January 2026	Registration open on a rolling basis for on-demand exams
NEW: Investment Basics for Fiduciaries (IB) 1-4	Assessments are available on-demand	Registration is open on a rolling basis. Final course assessment must be taken within 12 months from enrollment.
STEP Canada Diploma Program (All Courses)	May 25, 2026	March 1, 2026
NEW FOR FULL MEMBERS: Taxation of Trusts & Estates (Standalone course)	May 25, 2026	March 1, 2026
Essay Submission	May 1, 2026	2025 topics can be found here

Education Program Updates

Diploma Students:

Results from the November 3, 2025, exam are now posted on your MY STEP account under "My Courses & Marks". Registration for the Spring 2026 term (exam date: May 25, 2026) is open. Select "Diploma Program Registration" in your MY STEP account to enroll.

Congratulations to students who have successfully completed the Diploma Program! Certificates will be mailed in early February 2026. Please ensure your preferred mailing address is updated in your profile by December 15, 2025.

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 committee meeting to review applications is scheduled for February 2026.

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. Find full details below!

Connect With Us on LinkedIn

Check out one of our recent LinkedIn posts:

Congratulations to our new TEPs!

Diploma Programs

Amandine Bourillon, TEP, STEP Montreal
Amrita Siva, TEP, STEP Toronto
Bhuvana Rai, TEP, STEP Toronto
Chris Geldert, TEP, STEP Calgary
Chris Shorey, TEP, STEP Ottawa
Eva Amoako, TEP, STEP Ottawa
Franco Pizzimenti, TEP, STEP Toronto
Haris Riaz, TEP, STEP Toronto
Jamie Henshilwood, TEP, STEP Southwestern Ontario
Jennifer Leach Sandford, TEP, STEP Vancouver
Katherine (Katie) Taylor, TEP, STEP Vancouver
Ken Kyriacou, TEP, STEP Toronto
Krista Young, TEP, STEP Calgary
Lucy Sun, TEP, STEP Vancouver
Marc André Castonguay, TEP, STEP Atlantic Provinces
Mary Liu, TEP, STEP Toronto
Mashi Zaman, TEP, STEP Toronto
Millie Pu, TEP, STEP Toronto
Ruixin Li, TEP, STEP Toronto
Sami Nathoo, TEP, STEP Montreal
Sherly Chan, TEP, STEP Toronto
Shuyi Feng, TEP, STEP Toronto
Tomi Olutunfese, TEP, STEP Saskatchewan



Essay Program

Casey Liu, TEP, STEP Toronto
Julian Franch, TEP, STEP Toronto
Luana Carvalho Ribeiro de Jesus, TEP, STEP Toronto

Expertise

Ashvin Singh, TEP, STEP Edmonton
Brandon Wiener, TEP, STEP Toronto
Brent England, TEP, STEP Vancouver
Cody Lohnes, TEP, STEP Atlantic Provinces
E. Courtney Petch, TEP, STEP Toronto
Kimberly Maiatico, TEP, STEP Toronto
Lindsay Hollinger, TEP, STEP Montreal
Stacey Ebenal, TEP, STEP Saskatchewan
Suzanne Poole, TEP, STEP Toronto

STEP Canada is proud to showcase recent recipients of the prestigious Trust and Estate Practitioner (TEP) designation. The below members were granted the designation in October, November, and December 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

Happy Holidays



The STEP Canada team extends warm holiday wishes to our dedicated members, volunteers, and supporters. We hope you find time to relax, recharge, and enjoy meaningful moments with loved ones this festive season.

Please note that the STEP Canada office will be closed from Wednesday, December 24 through Thursday, January 1, and will reopen on Friday, January 2.

Warm wishes,
Michael, Janis, Amanda, Jenifer, Maria, Katelynn, Megan, Carisa, Asger, and Julie!

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 more than 13,000 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 2024-25 Branch Bundle seminars and the 2025 National 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.

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

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