



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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25th National Conference

The must attend event of the trust and estate industry is returning!

Please join us in-person on June 19-20, 2023 for STEP Canada's 25th National Conference. As always, you can look forward to two days of timely technical sessions, insightful keynotes, and valuable networking opportunities alongside fellow practitioners from across Canada, the US, and overseas.

The 2023 conference will offer hybrid delivery. The in-person event will take place June 19-20 in Toronto; with online on-demand viewing options for all 17 sessions available as of June 26 and onwards.

This year will also feature a special 25th Anniversary celebration!

Watch your email - details and registration are opening this week!

Coming Soon: 2023-24 Membership Renewals



Are your contact details up to date?

It's important to update your contact details with STEP Canada to ensure we can reach you with important updates regarding your membership renewal. Update your contact details by logging in to your MY STEP account [here](#).

At the beginning of March 2023, all STEP Canada members will be mailed their annual renewal package containing details for this year's renewal period, at the same time the portal in your MY STEP account will open for processing membership renewal dues.

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

The deadline to renew your membership for 2023-24 will be April 1, 2023.

Watch your inbox in early March for details on how to renew.

Thank You for Joining Us

Canada/US Cross-Border Estate Planning

THANK YOU to the almost 400 delegates that sold out our program and joined us in five cohorts over the past five weeks to take in our first two-day online course, "Canada/U.S. Cross-Border Estate Planning".

We would like to again express our deepest gratitude to our incredible panel, Leslie Kellogg, Carol Fitzsimmons, Britta McKenna, and Paul Gibney, for putting together this highly sought-after course.

For those lucky enough to attend, you know you attended something very special.

eNews: BCLI's Undue Influence Recognition & Prevention Guide



The BC Law Institute (BCLI) has recently released the electronic versions of the updated Undue Influence Recognition & Prevention Guide and accompanying Reference Aid. Courtesy of BCLI, links to the new Guide and Reference Aid can be accessed from the Resources Section of the STEP Canada website, after **member login**.

From BCLI, "We are grateful for the comments on the Consultation Draft of the updated Guide that were provided on behalf of STEP Canada in September 2022. They were extremely helpful to us and our Project Committee in revising the draft and finalizing the new Guide. We hope the new version of the Guide and Reference Aid will serve the estate planning community as a useful resource."

Tax Technical Committee
STEP Canada

Family Enterprise Advisor

Only the Family Enterprise Advisor (FEA) Program prepares you to be fluent in the complexities and nuances of serving business families.

The **FEA Designation** is the global benchmark in family business advising. Designed for professionals with significant technical knowledge, taking the FEA Program will enhance your ability to serve your family enterprise clients. In the crowded field of family enterprise advising, there is one sure way to stand out: the FEA Designation.

In 2023, we will be offering you three opportunities to become "fluent in family enterprise". The FEA Program will now feature a blend of virtual and in-person delivery in several exciting locations across Canada! Connection and convenience in one executive education experience. Register for the 2023 FEA Program today! **STEP Members receive a 10% discount.**



"For almost 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 Lead
TD Wealth Family Office

STEP 18th Annual Private Client Awards

Entries are now open for the 18th Annual STEP Private Client Awards!

This year 18 categories are open to individuals and firms. Entries are encouraged from all over the world and the whole private client community!

Entries are open until April 14, 2023. The finalists will be announced in July, and the winners will be announced at the awards ceremony on September 21, 2023.



18th Annual STEP PRIVATE CLIENT Awards

ENTRIES NOW OPEN!
Showcase your excellence to your peers and clients

ENTRY DEADLINE: APRIL 14, 2023

“ We are a new boutique firm, having opened our doors in July 2020 during the pandemic. The recognition goes a long way to ensure we can continue to do the work we do for vulnerable clients. ”

NIKA LAW LLP, Canada - winners of STEP's 'Vulnerable Client Advisory Team of the Year' 2021/22

18 categories open for entry

[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.

[Associate Trust Officer / Trust Officer - TD Private Wealth \(Edmonton, AB\)](#)

[Trust Officer - Solus Trust Company Limited \(Vancouver, BC\)](#)

[Conseiller\(ère\) - Fiduciaire / Advisor - Business Strategies - Desjardin \(Montreal, QC\)](#)

[Income Tax Rulings Directorate - Canada Revenue Agency \(National Capital Region, Canada\)](#)

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	March 1, 2023 June 1, 2023 September 1, 2023	Registration Closed May 1, 2023 August 1, 2023
STEP Canada Diploma Program	May 29, 2023 November 6, 2023	March 29, 2023 September 7, 2023
Essay Submission	May 1, 2023 October 1, 2023	*2023 topics can be found here

Updates

Diploma Program

Registration for Peer learning session 1 is open. If you haven't already, sign up today! This is a great opportunity to enhance your learning experience, benefit from the diversity of professional experience of your peers, and make connections.

Peer learning session 2 dates are noted on your classroom portal. Stay tuned for an announcement for when registration opens.

Certificates

For students who completed the Diploma or CETA Programs in 2022, program completion certificates have been mailed out to the preferred address in your STEP Canada profile.

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 February 1, 2023, our first batch of the new year.

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

- Adam Pasquali, TEP, STEP Toronto
- Adrienne Lo, TEP, STEP Toronto
- Alexander Di Lello, TEP, STEP Southwestern Ontario
- Alexandra Firsov, TEP, STEP Toronto
- Anthony Shawn Richard, TEP, STEP Toronto
- April Mae Gamboa, TEP, STEP Vancouver
- Ashley Harmon, TEP, STEP Southwestern Ontario
- Brent Percival, TEP, STEP Ottawa
- Chantal Morgotch, TEP, STEP Saskatchewan
- Cheryl Aspeck, TEP, STEP Ottawa
- Christina Gar-Ning Shum, TEP, STEP Toronto
- Corey Bennett, TEP, STEP Toronto
- David Sam, TEP, STEP Montreal
- Diana Nicorescu, TEP, STEP Vancouver
- Earl Glazerman, TEP, STEP Vancouver
- Fan Wang, TEP, STEP Vancouver
- Gagandeep Tiwana, TEP, STEP Calgary
- Gary Leung, TEP, STEP Calgary
- Greg Burrows, TEP, STEP Calgary
- Isabelle Cadotte, TEP, STEP Calgary
- Jennifer Wong, TEP, STEP Vancouver
- Jenny Mei Zhang, TEP, STEP Toronto
- Ji Won Lee, TEP, STEP Vancouver
- Jie Fan, TEP, STEP Toronto
- Jolene Hall, TEP, STEP Winnipeg
- Joseph Figliomeni, TEP, STEP Toronto
- Joy Wang, TEP, STEP Vancouver
- Lan Lin, TEP, STEP Toronto
- Luann Jones-Foster, TEP, STEP Atlantic
- Luigi Iannuccilli, TEP, STEP Toronto
- Marly Peikes, TEP, STEP Toronto
- Mathew Bushnell, TEP, STEP Edmonton
- Meagan Balaneski, TEP, STEP Edmonton
- Meghan Simpson, TEP, STEP Toronto
- Michael Earle, TEP, STEP Atlantic
- Michael Tang, TEP, STEP Toronto

TEP
CANADA

- Michal Janecek, TEP, STEP Toronto
- Mike Huson, TEP, STEP Ottawa
- Nasim Chark, TEP, STEP Edmonton
- Pavel Roubtsov, TEP, STEP Montreal
- Pawel Biedacha, TEP, STEP Calgary
- Peter Joseph Moraitis, TEP, STEP Montreal
- Prabin Sapkota, TEP, STEP Toronto
- Richard Wade Fallan, TEP, STEP Vancouver
- Robert Yuan An, TEP, STEP Vancouver
- Sara Halickman, TEP, STEP Montreal
- Shauna Lutzer, TEP, STEP Edmonton
- Sivarajah Sinnathamby, TEP, STEP Toronto
- Sophia Yubing Li, TEP, STEP Vancouver
- Stephanie Albiston, TEP, STEP Vancouver
- Stephen Maglio, TEP, STEP Okanagan
- Steve Gobel, TEP, STEP Ottawa
- Sylvio Di Cristofano, TEP, STEP Montreal
- Tara Hauck, TEP, STEP Vancouver
- Tiffany Franklin, TEP, STEP Calgary
- Tina McLean, TEP, STEP Edmonton
- Tom Qubti, TEP, STEP Toronto
- Vandana Garg, TEP, STEP Toronto
- Vanessa Sarveswaran, TEP, STEP Montreal
- Velma Tsang, TEP, STEP Toronto
- Vesna Kusic, TEP, STEP Toronto
- William Curtosi, TEP, STEP Southwestern Ontario
- Yongbin (Bill) Zhao, TEP, STEP Toronto
- Yongzhi (Jim) Huang, TEP, STEP Toronto
- Yun (Niko) Deng, TEP, STEP Toronto
- Zaman Sahi, TEP, STEP Toronto

Essay Program

- Colleen Stewart, TEP, STEP Toronto

Expertise

- Bryan Lew Yew Pha, TEP, STEP Toronto
- Robert Innes, TEP, STEP Southwestern Ontario
- Victoria Zarembo, TEP, STEP Toronto
- Yat-Sze Lo, TEP, STEP Vancouver

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.](#)

Mon
Mar 6

STEP Toronto
STEPping out to Lunch
11:45am - 1:00pm ET
Zoom

Wed
Mar 8

STEP Calgary
TEP Talk
8:00am - 9:00am MT
Zoom

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](#)

[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