

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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Two-Day Online Course

Canada/US Cross-Border Estate Planning



This week (January 10th) STEP Canada kicks off the virtual tour for our first ever two-day online course! Don't miss your chance to benefit from this excellent opportunity – there are still spots available in two (of the five) cohorts! Join us from the comfort of your home or office for "Canada/US Cross-Border Estate Planning", which offers a mix of recorded and live online interactive learning and a total of 10 hours of CPD!

Our instructors, **Leslie Kellogg**, **Carol Fitsimmons**, **Britta McKenna**, and **Paul Gibney** have designed an original course for practitioners in law, accounting, financial planning, or insurance whose clients face cross-border estate-planning and US taxation issues. Numerous practical examples, case studies, and strategies will be provided.

Members \$425 | Non-Members \$575

Details and Registration

Coming Soon: 2022-23 Branch/Chapter Bundles

No matter how you attend, in-person or online, the six seminars included in the 2022-23 hybrid Branch/Chapter Bundle offer in-depth technical content, excellent value, and continuing education (CPD) opportunities.

Up Next:

Planning for Family Members with Disabilities

National Seminar - Online Viewing Only

January 19, 2023 | 12:00pm - 2:00pm ET

MODERATOR



Rachel Blumenfeld
Aird & Berlis LLP

SPEAKERS



Kevork Kevorkian
Levy Salis LLP



Erin Lafuente
Dentons



Ken Pope
K. Pope Law

Our panel of experts will present a comprehensive refresher on the variety of strategies to consider when your clients need planning for a disabled family member, including updates on one of the most commonly used tools, Henson Trusts. Matters of mental illness, addiction, dementia, and the Disability Tax Credit and RDSPs will be contemplated, including addressing challenges with intermittent capacity/incapacity, gradual decline, respect for autonomy, gradual reduction in independence and increase in vulnerability. We will also revisit traditional clauses typically used in our wills and substitute decision making documents

to address these issues, and whether we might update them to provide more guidance and flexibility to our fiduciaries and to better suit the nuanced situations. The presentation will also include an examination of the Bill C-22 proposals to enact the Canada Disability Benefit Act to create a new Canada disability benefit for working-age persons with disabilities and its resulting information disclosure power and potential engagement of section 8 of the Charter. Lastly, we will discuss the various Court options available if no planning is done, or if there are issues regarding the planning or choice of substitute decision makers, such as trustee and guardianship litigation.

Not yet registered? Join the 800+ members and non-members who will benefit from this program's CPD and networking opportunities by registering today.

[Details and Registration](#)

Save the Date

Monday & Tuesday, June 19 & 20, 2023 - Toronto



Join us in-person for a lineup of outstanding sessions featuring over 50 respected experts who will deliver the highly regarded technical content this conference is known for! Not only is this the first in-person conference since June 2019, but it also marks STEP Canada's 25th anniversary - Please join us in celebrating this very special milestone.

In-person conference proceedings will be recorded and made available post-conference in an e-archived on-demand format to all in-person and e-archived on-demand registrants.

Take in all 17 sessions and receive up to 16.75 hours of CPD!

Details and registration coming soon

Coming Soon: 2023-24 Membership Renewals



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.

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

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.

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

NEW STEP Canada Event Calendar

STEP Canada is thrilled to launch the new all-inclusive event calendar on step.ca.

Curious if there are any events coming up for your branch? Are you a student wondering if there are any networking or study group opportunities approaching, or wondering when your deadline to register is? Look no further! Search all STEP Events including branch/chapter seminars and networking events, national conferences and webcasts, education and important dates using the new STEP Canada Event Calendar.

[View the calendar here](#)

STEP 17th Annual Private Client Awards

Thank you to everyone who attended the awards evening in-person. Congratulations to all nominees and winner's of the 17th Annual STEP Private Client Awards.

Read the full list of winner's and more in the official press release:

[Press Release](#)

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.

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	February 1, 2023 May 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

Join peers from your local branch/chapter to collaborate on a case study that will help you prepare for the exam. This is a great opportunity to enhance your learning experience, benefit from the diversity of professional experience of your peers and make connections.

The first round of peer learning sessions will take place the week of March 6th, 2023. An email will be sent shortly with information on how to register through your online class platform.

The second peer learning sessions are scheduled for early April. More information to follow.

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'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
Jan 16

STEP Toronto
Blue Monday Social Event (Members Only)
5:00pm - 7:00pm ET
BMO, First Canadian Place

Thur
Feb 2

STEP Winnipeg
TEP Talk
12:00pm - 1:00pm CT
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](#)

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Got Questions? Please Contact Us | Phone: 416-491-4949 ext.221 | Toll-free: 1-877-991-4949 | step.ca