



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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18th Annual STEP Private Client Awards

Finalists Announced

We are thrilled to recognize the four outstanding Canadian finalists for the 18th Annual STEP Private Client Awards in the following three categories:

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

The winners will be announced at the awards ceremony on September 21st, 2023, at the London Hilton on Park Lane in London, UK.

Details and Ticket Booking

2022 Winners

25th National Conference

Once again, STEP Canada has surpassed all previous records by receiving an astounding **1,020** registrations for the hybrid 25th National Conference, including over 700+ delegates that joined us at the Sheraton Centre Toronto Hotel for the first in-person conference since 2019. The event was filled with excellent networking opportunities, the reuniting of worldwide colleagues after years of virtual meetings, superior technical content, and even a few wonderful surprises! Our celebration event at The Carlu, featuring one of Toronto's hottest cover bands, Dwayne Gretzky, was also a huge success.

For online delegates, or those who wish to rewatch or watch any concurrents they missed, all sessions have been archived and are now available for on-demand viewing at your leisure.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 the Alberta Insurance Council and FP Canada, and CPD/CE certificates are scheduled to be sent to delegates in mid-August 2023.

CPD Accreditation List

STEP would like to once again extend our gratitude to the 40 sponsors who support the conference, consistently advocate for STEP, and lead the way in the trust and estate industry. Please take a few moments to watch the thank you video we created to show them our appreciation.

Watch Our Sponsor Video

Read About Our Sponsors and the Services They Provide

Registration is still open for anyone who wishes to take advantage of the technical content and applicable

CPD credits available.

Details and Registration



2022 STEP Canada Volunteer of the Year

On Tuesday, June 20th, Corina Weigl was presented with the Michael Cadesky Volunteer of the Year Award for her continued dedication and magnanimous contributions to STEP Canada.

Corina has been Chair of the National Conference Programming Committee since 2020, Chair of STEP Toronto for 2021-2023, has been a contributing member of the STEP Inside Editorial Board since 2019, and has been appointed as Secretary for the STEP Canada National Board beginning her term in 2023.

Please join us in thanking Corina for all her hard work.



Welcome to our New Board of Directors

We warmly welcomed members of STEP Canada's 2023-24 Board of Directors at the 25th National Conference.

The 17 members that make up our national board are leaders in the trust and estate industry, and will assume a leading role in communicating the views of Canadian members to governments, tax authorities, regulators, and the public.

With a deep appreciation for their vision and leadership, please join us in thanking them for their dedicated support to STEP Canada and the trust and estate industry.



Pictured (L to R):

Paul Taylor, Carol Sadler, Ruth Spetz, Jennifer Eshleman*, Amanda Doucette*, Mariska Loeppky, Aileen Battye, Jessica Lyle, Richard Niedermayer, Rachel Blumenfeld, Ian Lebane, Michelle Coleman, Chris Ireland, Nicole Ewing, Kenneth Keung, Laura West, and Corina Weigl.

Not Pictured:

Paule Gauthier, and Brian Cohen.

*Chapter Chair

2023-24 Membership Renewal

The 2023-24 membership renewal campaign wrapped on Sunday, July 9th, 2023, with over **3,250** members confirming their commitment to STEP by renewing their memberships for another year.

Thank you to all who submitted timely renewals this year.

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 | September 6, 2023 | August 6, 2023 |
| STEP Canada Diploma Program | November 6, 2023 May 29, 2024 | September 6, 2023 March 29, 2024 |
| Essay Submission | October 1, 2023 | *2023 topics can be found here |

Updates

COMPLETION CERTIFICATES

For CETA, DIPLOMA, and ESSAY students who have completed their program, completion certificates will be mailed to your preferred address on file later this summer.

A reminder for Diploma students that have completed their program: To receive your TEP designation, you must submit your Full Membership Upgrade Application to education@step.ca.

REGISTRATION

Congratulations to all CETA and Diploma students that have successfully completed an exam this term. Reminder to register for your next course through your MY STEP account.

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

Branch and chapter volunteers are hard at work arranging expert speakers and thought-provoking topics for their 2023-24 Branch Bundle program schedule.

Details and registration will be announced mid-August.

Reminders

Most **STEP Canada staff** work from home 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.

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