



---

E-Newsletter Vol. 13 | Issue 7 | July 8, 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](#)

---

## STEP's 20th Annual Private Client Awards

We are thrilled to recognize the Canadian finalists for this year's Private Client Awards!

**Boutique Firm of the Year (legal)**

Whaley Estate Litigation (WEL) Partners

**Boutique Firm of the Year (non-legal)**

Our Family Office Inc.

**Employer of the Year**

NIKA LAW LLP

**Multi-Family Office Team of the Year**

First Affiliated Holdings Inc.

Our Family Office Inc.

TD Wealth Family Office

**Philanthropy Team of the Year**

Our Family Office Inc.

The STEP Private Client Awards are seen as the hallmark of quality within the private client industry. Let's wish our finalists the best of luck!

Winners will be announced at the awards ceremony on September 18, 2025 at the London Hilton on Park Lane in London, UK. For the full list of finalists, please click the link below.

[2025 Private Client Awards Finalists](#)

---

## Thank You for Renewing Your STEP Membership!

Our renewal campaign for 2025-26 closed on Wednesday, July 2nd, with over 92% of STEP Canada members confirming their commitment to STEP and completing their annual membership renewal - thank you!

Renewing your STEP Canada membership allows your continued use of the TEP designation (if applicable) and grants 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.

---

## 27th National Conference



### Experience The Conference

Filled with learning, connection, and collaboration, the 27th National Conference was a huge success! Over 750 delegates gathered in Toronto on June 16 and 17 to gain valuable insights from our expert speakers and engage with industry sponsors in our exhibit hall, all while networking with fellow trust and estate professionals.

The fun isn't over - all 19 amazing sessions that were delivered June 16 and 17 are now available for online on-demand access!

Enjoy the experience and gain access to this year's outstanding content at your convenience. It's the perfect opportunity to take in expert insights, earn valuable CPD credits, and engage with our dynamic program – all on your time, from the comfort of your home or office. Whether you're an advisor, lawyer, or wealth professional, and whether you're a STEP member or not, this is a great opportunity to stay informed and ahead in your field. Don't miss out!

### Details & Registration

### Thank You to Our Generous Sponsors

STEP Canada is grateful to have secured a tremendous level of support from several industry sponsors. Their continued support allows us to make your conference experience the best it can be! Click the link below to learn more about these generous organizations.

### Learn More About Our Sponsors

---

## Michael Cadesky Volunteer of the Year Award



During the welcome remarks on Tuesday morning, the Michael Cadesky Volunteer of the Year Award was presented to the Canadian member of STEP who best demonstrated magnanimous voluntary contribution for the past year. Please join us in congratulating the 2025 recipient, **Paul Taylor!**

Paul is a Partner of Borden Ladner Gervais LLP, based in Ottawa, and received his TEP designation in 2013 after graduating from the STEP Canada Diploma in Trusts and Estates. He has spent over a decade volunteering for STEP Ottawa, in roles such as Student Liaison Officer, Member Services Officer, and Secretary, before being elected Branch Chair in 2020. He has spent the last 10 years supporting the National Conference Program Committee, acting as Chair for the last two years. Paul also sits on STEP Canada's Editorial Committee, serves on the International Client Special Interest Group Steering Committee, and is part of STEP's Next Gen Working Group. For the last two years he has been a Director at Large of STEP Canada, and in 2025 was elected to the role as National Treasurer.

---

## 2024 Award Winners

## Education Program Award Winners

STEP Canada's educational programs are more than just career development opportunities; they are an investment in the future of this profession. By enrolling in one of STEP Canada's programs, you help strengthen and expand your skill set, elevate industry standards, and enhance the recognition of the TEP designation.



**Ana Wagner**  
Laredo Law, Toronto  
2024, Highest Mark  
Law of Trusts



**Jonah Friedman**  
Kilmer Van Nostrand Co.  
Limited, Toronto  
2024, Highest Mark  
Taxation of Trusts & Estates



**Rehaaz Boodhoo, TEP**  
RBC Dominion Securities,  
Toronto  
2024, Highest Mark  
Wills, Trust & Estate  
Administration



**Francesca Loreto, TEP**  
Baker Tilly KDN LLP, Toronto  
2024, Highest Mark  
Trust & Estate Planning



**Michael F. Sims, TEP**  
Canada Revenue Agency,  
Edmonton  
2024, Gerald W. Owen Book  
Prize



**Michael von Keitz, TEP**  
O'Sullivan Estate Lawyers,  
Toronto  
2024, Highest Mark  
Essay Program



**Shenyang Fan**  
Toronto  
2024, Highest Mark  
CETA

## Best National Conference Presentation Award

This Award honours the speakers who delivered the Best Conference Presentation at the previous year's conference, as rated by the Conference attendees.

**2024 National Conference Highest Rated Concurrent Session:  
"Top 10 Tax Nasties"**



**Kenneth Keung, TEP**  
Doane Grant Thornton LLP,  
Vancouver



**Sathees Ratnam, TEP**  
PwC Canada, Toronto

## Best Article Published in STEP Inside

This Award is presented to the author of the best writing published by STEP Canada in its national newsletter, STEP Inside.

**2024 STEP Inside Best Article:  
"Protectors in Trust Instruments" - January 2024, Vol. 23, No. 1**



**Barbara Kimmitt, TEP**  
Bennett Jones, Calgary

Congratulations to all 2024 Award winners!

[Learn More About Our Awards](#)

---

## Sneak Peek: 2025-26 Program Season Flyers



### Get Ready for an Exciting 2025-26 Program Season!

Your Branch/Chapter Board is excited to share a sneak peek of what's ahead for the upcoming event season. From can't miss networking opportunities to valuable CPD, we've got an incredible lineup in store and we can't wait to welcome you!

Be sure to check out the 'Save the Dates' flyers by selecting your branch or chapter after clicking on the link below.

Behind the scenes, our team is working hard to finalize all the details. Stay tuned for full event information and registration which will launch in August.

[Save the Date Flyers](#)

---

## 2024-25 Program Season

Are you looking for regionally focused in-depth technical content or ways to meet your CPD requirements? The 2024-25 program season has now wrapped up, but most branches and chapters have online on-demand seminars that will remain available until December 31st!

To learn more, click the link below and select your local branch or chapter.

[View the 2024-25 Online On-Demand Options](#)

---

## 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](mailto: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](mailto:news@step.ca) to express your interest in joining the editorial committee (2-3 opportunities annually).

---

## 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.

[Senior Tax Manager - S+C Partners LLP \(Mississauga, ON\)](#)

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	September 3, 2025	August 3, 2025
STEP Canada Diploma Program All Courses	November 3, 2025	September 1, 2025
Essay Submission	October 1, 2025	<a href="#">2025 topics can be found here</a>

## Updates

### Diploma Program Update

Fall term registration is now open! Login to your MY STEP account and select 'Diploma Program Registration' to enroll. Reminder: The deadline to register for the November exam is September 1, 2025.

Watch your classroom for the schedule of our two **virtual instructor tutorials** - essential sessions to support your success.

**Completed the program?** Don't forget to submit your Full Membership Upgrade Application to [education@step.ca](mailto:education@step.ca) to receive your TEP designation.

[Login to MY STEP](#)

## NEW Certificate Program Coming Soon

### Investment Basics for Fiduciaries

Launching this fall, this program covers essential investment knowledge for administering estates, trusts, and managing 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.

- **Fiduciary Roles & Responsibilities** - Master the key duties of executors, trustees, and decision-makers for incapable clients
- **Investment Fundamentals** - Develop a foundation in investment principles tailored to fiduciary management
- **Legal & Tax Considerations** - Understand the legal and tax framework that guides fiduciary investment decisions
- **Real-World Case Studies** - Apply your knowledge to practical fiduciary scenarios for informed, responsible decision-making

Connect with our Education Team at [education@step.ca](mailto:education@step.ca) if you are interested in learning more.

---

## 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.

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

---

## 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 National Conference and the Canada-US Cross-Border 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](mailto: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.

STEP Canada  
45 Sheppard Avenue East  
Suite 510  
Toronto, ON M2N 5W9 - Canada  
Telephone: 416-491-4949