

Hey member! With access to our monthly **STEP Insider**, you receive the latest news about upcoming CPD and networking events, practitioner opportunities, education updates, and more!

Newsletter Vol. 14 | Issue 3 | March 10, 2026

Looking to see what events are taking place this month? Scroll down!



[NEW STEP Canada Website](#)

[STEP Worldwide Member Directory](#)

[STEP Worldwide Website](#)

[Practitioner Opportunities](#)

## Renew Your STEP Membership for 2026-27

**Due Date: April 1st, 2026**

It's that time of year again! Login to your MY STEP account to sign the annual membership declaration and submit payment for your renewal.

Renewing your membership maintains your access to exclusive STEP member benefits, including preferential rates for technical seminars and conferences; access to publications, guides and resources, and the Searchable Resource Tool; and use of the prestigious TEP designation (if applicable).

Take 5 minutes today to ensure your membership remains in good standing.



[Renew Your Membership Today](#)

## STEP Canada's 28th National Conference

**Building Connections, Sharing Knowledge**

June 1-2, 2026 | In-Person, Toronto

The speaker lineup has now been released! [Dive into the program schedule](#) to explore the over 50 leading experts who will present across 19 unique sessions.

Demand for this event grows each year and in-person attendance will sell out. Don't wait to long to confirm your attendance!

*"I loved reconnecting with old friends and colleagues, and making new connections. The sessions were interesting and I know I will refer back to the written content many times in the future."*



[Secure Your In-Person Spot](#)

## Refreshed Marketing Brochures for Clients

As part of a new national campaign, STEP Canada is aiming to help Canadians identify and understand the TEP designation so they can make informed decisions with confidence.

These marketing brochures, updated in 2025, are designed for you to display in your office or provide to your clients in order to make complicated matters easier for them to understand. They are available only to members of STEP Canada.

For the cost of printing, only \$5 CAD for a pack of 10 brochures (+ tax and shipping), these brochures provide excellent value for promoting your specialized skillset and supporting clients.



[Learn More About Our Brochures](#)

---

## 21st Annual STEP Private Client Awards

Get your submissions ready for the 21st Annual STEP Private Client Awards, and have the chance to be recognized and celebrated on the global stage!

Seen as the hallmark of quality within the industry, 25 unique categories will be open for entry until April 10th, 2026. STEP is excited to celebrate and champion the highest standards in our community, and that could be you!

Winners will be announced at the Awards Ceremony in London, UK on September 17, 2026.



I Would Like to Be Recognized

---

### 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.



**Tony Yu, TEP**  
BMO Trust Company  
STEP Vancouver

*"Becoming a STEP member has been a cornerstone of my professional development, offering access to a distinguished regional, national, and international community united by a shared commitment to excellence in trust and estate practice. Through STEP, I have been able to develop enduring professional relationships with accountants, lawyers, investment advisors, private bankers, and trust professionals across Canada. These connections have meaningfully enhanced my practice and reinforced the critical importance of collaboration in addressing the increasingly complex needs of families and fiduciaries.*

*My involvement with STEP evolved naturally over time. What began as participation in local educational programs grew into a desire to contribute more meaningfully to the profession and support the development of future practitioners. This progression led me to volunteer with STEP Vancouver, where I serve as the Program Officer, as well as at the national level through the Program Committee for the STEP Canada National Conference. Volunteering has been a rewarding extension of my career, providing opportunities to help shape educational programming, advance thought leadership, and collaborate with peers who are deeply committed to strengthening our profession.*

*I would strongly encourage STEP members—whether students, early-career professionals, or seasoned practitioners—to take an active role in shaping the profession by getting involved in ways that align with their interests and stage of career. STEP offers a wide range of pathways to engagement, from local branch initiatives and mentorship to participation on national committees, each providing meaningful opportunities to contribute and lead. In my experience, volunteering not only strengthens the STEP community, but also accelerates professional growth, broadens perspective, and builds lasting, cross-disciplinary relationships. For those seeking to elevate their practice, expand their network, and make a tangible impact, active involvement with STEP is a powerful place to start."*

**Tony is currently a Program Officer for STEP Vancouver and sits on the 2026 STEP Canada National Conference Program Committee. Tony has also contributed his knowledge by moderating and speaking at both STEP Canada National Conferences and local STEP Vancouver seminars.**

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](mailto:memberservices@step.ca).

Learn More About Volunteering With STEP Canada

---

### 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.

Learn More



---

## Recent STEP Canada eNews and Submissions

February 6, 2026:  
STEP Canada Tax Technical Committee  
**RE: [Legislation Pertaining to the Flipped Property Rules](#)**

February 25, 2026:  
STEP Canada Tax Technical Committee  
**RE: [Proposed Amendments to the Trust Deemed Disposition Anti-Avoidance Rule in Subsection 104\(5.8\)](#)**

[Read Previous Submissions](#)



---

## 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. [Visit the FAQ section](#) on our website to learn more about CPD accreditation for STEP Canada's events.



If you have questions relating to your CPD certificates or would like more information, please email [memberservices@step.ca](mailto:memberservices@step.ca).

---

## STEP CPD Learning Course: Digital Assets

Digital assets are now part of everyday life and increasingly form a key part of clients' estates. From cryptocurrencies and cloud storage to social media accounts and domain names, estate practitioners need the skills to manage these assets confidently and securely. This course will enable you to confidently navigate digital assets in estate planning and administration with the knowledge and skill essential for today's digital world.

Discounts are available for STEP members and Employer Partners.



[Learn More About STEP's CPD Course](#)

---

## STEP Canada National Webcasts - Available On-Demand

Registration is still available for the two recent STEP Canada National Webcasts:

- **2025 Federal Budget Webcast**
- **Beyond the Indian Act: A Primer on Estates, Succession, Tax and Trusts for Indigenous Clients**

The on-demand version of these broadcasts will be available until June 30, 2026. These valuable webcasts were broadcast in English, and are offered free of charge for STEP Canada Members and Students.



[Get Access to These Webcasts Today](#)

---

## Upcoming Events Across the Country

**Registration Now Open**

**STEP Calgary**  
March 11, 2026  
12:00pm - 2:00pm MT  
*Members Only*

[Hybrid TEP Talk](#)

**STEP Edmonton**  
March 11, 2026  
11:45am - 1:30pm MT  
*Branch Bundle Seminar*

[The Intersection of Family Trusts and Family Law](#)

**STEP Southwestern Ontario**  
March 12, 2026  
12:00pm - 1:00pm ET  
*Members Only*

[Online TEP Talk](#)

**STEP Winnipeg**  
March 17, 2026  
12:00pm - 1:30pm CT  
*Branch Bundle Seminar*

[Administration, Valuation, and Taxation of Trusts & Estates with New Property](#)

**STEP Saskatchewan**  
March 18, 2026  
3:00pm - 5:00pm CST  
*Branch Bundle Seminar*

[Watch Party: Cross Border Financial Planning for US Persons in Canada](#)

**STEP Ottawa**  
March 12, 2026  
4:00pm - 5:30pm ET  
*Branch Bundle Seminar*

[Strategic Transitions: Integrating Wealth, Estate, and Succession Planning for Business Owners](#)

**STEP Montreal**  
March 19, 2026  
12:00pm - 2:30pm ET  
*Study Session*

[Revue de jurisprudence / Review of Case Law](#)

**STEP Winnipeg**  
March 25, 2026  
12:00pm - 1:00pm CT  
*Members Only*

[Online TEP Talk](#)

**STEP Atlantic**  
March 26, 2026  
2:30pm - 4:30pm AT  
*Branch Bundle Seminar*

[Understanding Capacity and Managing Our Own Emotions](#)

### Save The Date - Registration Opening Soon

**STEP Calgary**  
April 8, 2026  
7:30am - 9:30am  
*Branch Bundle Seminar*

[Farm Tax and Estate Planning](#)

**STEP Saskatchewan**  
April 8, 2026  
1:30pm - 2:30pm CST  
*Students Only*

[Talking Trusts With Troy](#)

**STEP Saskatchewan**  
April 8, 2026  
3:00pm - 5:00pm CST  
*Branch Bundle Seminar*

[A Practitioner's Guide to the Trust Life Cycle: Tax and Best Practices](#)

**STEP Edmonton**  
April 9, 2026  
4:30pm - 6:30pm  
*Students Only*

[Student Case Study Review](#)

**STEP Toronto**  
April 13, 2026  
12:00pm - 1:00pm ET  
*Members Only*

[In-Person STEPPing Out to Lunch](#)

**STEP Toronto**  
April 15, 2026  
5:00pm - 8:00pm ET  
*Students Only*

[Snakes and Ladders Trivia Night](#)



**Branch and Chapter Bundles** offer can't-miss networking opportunities and valuable CPD seminars, designed to support professional growth and connections.

If you haven't registered yet, not to worry - there is still time! 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 hope to see you at an event before the season is finished!

**Branch Bundle registrants will have access to online on-demand replays (where applicable) until December 31, 2026.**

[View All 2025-26 Seminars & Events](#)

## Outreach & Development: Find Us in Your Community

Date & Location	Event & Location	Type of Outreach
<b>March 23, 2026</b> Edmonton	University Lunch & Learn, University of Alberta	Lunch & Learn for University Students

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

More information can be found on the Outreach and Development section of our website:

[Outreach & Development](#)

## Education Centre

[Education Program](#)

[Exam/Essay Date](#)

[Registration Deadline](#)

<b>CETA 1-4</b>	All CETA exams are available online on-demand. Must be completed within 12 months of registration.	Registration open on a rolling basis for on-demand exams
<b>NEW: Investment Basics for Fiduciaries (IB) 1-4</b>	Assessments are available on-demand. Final course assessment must be taken within 12 months from enrollment.	Registration is open on a rolling basis.
<b>STEP Canada Diploma Program (All Courses)</b>	May 25, 2026	Registration closed
	November 2, 2026	September 1, 2026
<b>NEW FOR FULL MEMBERS: Taxation of Trusts &amp; Estates (Standalone course)</b>	May 25, 2026	Registration closed
	November 2, 2026	September 1, 2026
<b>Essay Submission</b>	May 1, 2026	<a href="#">2026 topics can be found here</a>

### Education Program Updates

#### Diploma Program:

To help support your preparation for the upcoming May exam, STEP Canada will be hosting two live-virtual tutorial sessions (English stream) and one tutorial session (French stream) for each course. To find your specific session dates and times, along with the registration links, please check your course website for more information.

#### Important Technology Requirements for STEP Diploma-Level Exams:

To uphold the integrity of the STEP Canada Diploma Program, we are updating the exam process to help keep pace with advances in generative AI (GenAI). This changes includes a new exam platform, and all exams will now require the following:

- Access to Google Chrome
- Administrator rights to download a Chrome extension (this is generally not permitted on employer laptops, and if applicable, you should connect with your employer IT support and/or make alternative arrangements to use a different device)
- Working webcam
- Stable, high-speed internet

Questions regarding these changes can be sent to [education@step.ca](mailto:education@step.ca).

#### 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](mailto: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. [Read our brochure to learn 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.



Follow STEP Canada

You can find the link to your local branch/chapter group on the STEP Canada corporate page.

Need help? View the [LinkedIn Cheat Sheet](#).

---

## 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