



E-Newsletter Vol. 13 | Issue 5 | May 13, 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](#)

[Advising Families Canada](#)

[Practitioner Opportunities](#)

It's Time to Renew Your Membership

Almost 90% of STEP Canada members have completed their annual membership renewal - thank you! If you haven't renewed your membership yet, please join them by logging to your MY STEP account to complete it. Membership renewals were due by **April 1, 2025**.

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.

If you have any questions or concerns regarding your membership renewal, please reach out to our Member Services team by emailing memberservices@step.ca.

[Login to MY STEP](#)

27th National Conference



Watch the Program on Your Schedule!

We are proud to announce that registration has exceeded our expectations, and in-person attendance for the conference is now sold out. But don't fret - you can still be part of the action!

While our in-person conference will be taking place in just a few weeks, you can set your own viewing schedule by registering for online on-demand viewing! 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, starting Monday, June 23.

All delegates are eligible to receive up to 22.25 hours of CPD.

Registration Tip: You can register for online on-demand and join the waitlist for in-person attendance. Switch to in-person if a spot opens up - just pay the difference!

[Details & Registration](#)

STEP's 20th Annual Private Client Awards

The prestigious STEP Private Client Awards celebrate their 20th anniversary in 2025! Entries are now closed, with over 300 submissions received. Winners will be announced at the Awards Ceremony in London, UK on September 18, 2025.

"Being recognised on a global scale with such a prestigious award gives us tangible proof for our commitment to excellence."

- **Patricia Saputo**, TEP, Crysalia - Montreal, QC
Winner of Family Business Advisory Practice of the Year 2024

[Learn More](#)

Your Opinion Matters



STEP is committed to giving you the very best member experience, and to do that, we need your help.

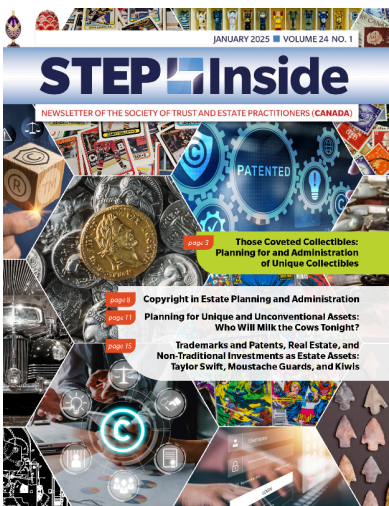
By taking just 10 minutes to complete STEP's member survey, you will help us better understand your needs, set our priorities, and improve the services delivered to you. Your feedback will directly influence our work.

The valuable insights from last year's survey enabled us to prioritize key areas that we knew were most important to members.

Only two and a half more weeks to complete the survey - help us, today!

[Take The Survey](#)

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 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 to express your interest in joining the editorial committee (2-3 opportunities annually).

[Learn More](#)

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 Trust Officer - RBC Royal Trust \(Ottawa, ON\)](#)

Have questions?

[More on Practitioner Opportunities](#)
or
[Post an Opportunity](#)

2024-25 Program Season

Are you looking for regionally focused networking opportunities, in-depth technical content, or ways to meet your CPD requirements? Check out what your local branch/chapter is offering for the 2024-25 program season!

Thoughtfully crafted by your volunteers and supported by generous sponsors, this year's seminar offerings will present you with numerous options to enhance your knowledge and expand your professional network.

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

- [STEP Atlantic](#)
- [STEP Calgary](#)
- [STEP Edmonton](#)
- [STEP Montreal](#)
- [STEP Okanagan](#)
- [STEP Ottawa](#)
- [STEP Saskatchewan](#)
- [STEP Southwestern Ontario](#)
- [STEP Toronto](#)
- [STEP Vancouver](#)
- [STEP Winnipeg](#)

Members can also view the Event Calendar to see all upcoming events.

[View the Event Calendar](#)

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	June 2, 2025	Registration now closed
	September 3, 2025	August 3, 2025
STEP Canada Diploma Program All Courses	May 26, 2025	Registration now closed
	November 3, 2025	September 1, 2025
Essay Submission	October 1, 2025	2025 topics can be found here

Updates

Diploma & CETA (2-4) Programs – Upcoming Exams

Exam Dates

- Diploma Exam: May 26, 2025
- CETA 2–4 Exam: June 2, 2025

Exam Credentials

Login credentials will be emailed to you as follows:

- Diploma students: by May 21, 2025
- CETA 2–4 students: by May 22, 2025

~ System demo information will be included with this email.

Exam Procedures

Step-by-step instructions and how to access system demo are available in your classroom. Please review these materials in advance to ensure you are fully prepared.

Accessing Exam Information

Visit the Exam Section of your classroom for full exam details, resources and important information.

Good luck to all students writing the upcoming exams!

Login to MY STEP

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 12,000 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

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 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.

Reminders

Click to [edit Email Preferences](#) or [Unsubscribe](#) from this list.

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