

E-Newsletter Vol. 12 | Issue 11 | November 12, 2024

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!

Coming Soon: STEP Canada Full-Day Course

Advising Executors From Death Certificate to Clearance Certificate

Enhance Your Expertise in Estate Management: A Specialized Full-Day Course for Tax and Estate Professionals!

Tailored for tax and estate professionals, this comprehensive course offers an in-depth exploration of estate management, empowering you to provide exceptional guidance to your clients. From initial administration tasks such as organ donation and funerals to intricate issues like multi-will management and asset distribution, acquire the comprehensive knowledge necessary. Gain a deep understanding of tax filings, probate applications, and the safeguarding of assets while addressing liabilities. Elevate your ability to confidently navigate beneficiary issues, compensation, and court proceedings.

Course curriculum authored by:



Michelle D. Coleman
CPA, CA, CEA, TEP: Edmonton
MNP LLP



Kristina Hyland
JD, TEP, Toronto
TD Wealth



Susannah Roth
LLB, TEP, Toronto
RBC Wealth Management,
Royal Trust

In addition to the three subject matter experts above, the curriculum has received contributions from additional experts, including a Litigator, a Designated Financial Planner (for insurance and registered plans), and a Quebec Notary. Senior practitioners with specialized experience advising executors will present the full-day course and guest appearances by one or two original authors (where possible). Be sure to save the date for the course date in your region:

STEP Winnipeg: Wednesday, January 8
STEP Ottawa: Wednesday, January 15
STEP Okanagan: Wednesday, January 22
STEP Vancouver: Thursday, January 23

STEP Edmonton: Wednesday, February 12
STEP Calgary: Wednesday, February 19
STEP Saskatchewan: Wednesday, February 26

STEP Montreal: Wednesday, February 5
STEP Toronto: Thursday, February 6

STEP Southwestern Ontario: Tuesday, March 4
STEP Atlantic: Thursday, March 6

Watch your email and step.ca for registration information. In-person capacity limits will be enforced; register early to avoid disappointment!

We Want Your Questions!

An invitation to all members to submit questions to the 2025 CRA / STEP Roundtable Committee for consideration.



The 2025 CRA / STEP Round Table Committee invites you to submit questions to be considered for the 2025 Roundtable presentation that will take place during the 27th National Conference in June 2025. Each year the much anticipated CRA / STEP Roundtable proves to be a highlight of the conference; and an invaluable resource to estate planning practitioners across the country. Your contribution to the “question bank” will be appreciated by the committee; and if selected, by thousands of practitioners.

Questions must be received by **FRIDAY, NOVEMBER 15th** for consideration.

[Submit Your Questions](#)

STEP Global Insights Survey: Attitudes to Wealth

INSIGHT SURVEY

Participate in our global insights survey on evolving attitudes to wealth



RESPOND NOW

Member and non-member practitioners are invited to participate in STEP's survey on evolving attitudes to wealth and taxation.

STEP is keen to get a wide range of perspectives, and members are encouraged to please participate and share the link with others. The greater the volume of participation, the more information we have to impart back to you!

Your insights will help shape a comprehensive understanding of whether and how clients' approaches to wealth planning, tax, inheritance, and social responsibility and philanthropy are shifting. The results of the survey will culminate in a report by STEP.

This survey will close on **November 13, 2024**.

[Please Take the Survey](#)

STEP Canada Member Survey



Congratulations to Byron Smith, TEP of Doane Grant Thornton LLP in Victoria, who is the lucky winner of the **Bose SoundLink Revolve+ II Bluetooth Speaker**, and was selected from 600 survey participants.

Thank you to all members of STEP Canada that took part in our recent member survey. We're committed to improving the areas that mean the most to you, whether it's events, resources, or networking opportunities. Your responses will help enhance the value and relevance of our programs, and ensure that we can best serve you and your professional development.

Save the Date: 27th Annual National Conference

Mark the date in your calendar!

Planning is underway for STEP Canada's 27th Annual National Conference, and we hope to see you in June 2025 taking advantage of great technical sessions, networking, and much more.

Monday, June 16 & Tuesday, June 17, 2025
at the Sheraton Centre Toronto Hotel

Monday, June 23, 2025
On-Demand Replays

Watch step.ca for more information to be released in January.



New Release - October STEP Inside



Jump into the newly released October edition of STEP Inside where we revisit STEP Canada's 26th Annual National Conference! Members can find their digital copy available after logging into their MY STEP account.

STEP Canada would like to express heartfelt appreciation to members of the editorial board, reviewers, National Conference presenters, and authors for sharing their valuable expertise with STEP members across the country.

As always, the editorial committee welcomes article proposals from all members for future editions at news@step.ca.

Don't forget!

As a benefit of membership, all members are entitled to receive a hard copy of this valuable resource in addition to the electronic copy. Review and update your subscription preferences in your MY STEP account

[Access Your MY STEP Account](#)

Family Enterprise Advisor

The Great Wealth Transfer is Here — Prepare for Success with the Family Enterprise Advisor (FEA) Program

Only the **FEA Program** equips you to navigate the unique complexities inherent in advising entrepreneurial families and families of wealth. As the global benchmark in family enterprise advising, earning the FEA designation helps you stand out in this increasingly crowded field.

The FEA Program is now offered in three annual cohorts: two with a blend of in-person and virtual learning, and one entirely virtual so you can earn the FEA designation from anywhere in the world. Register now to take advantage of early bird pricing, plus a 10% discount for STEP Members!



"For more than 20 years, I have been practicing tax and estate planning law and consider myself to be a trusted advisor to my clients. My clients are predominantly owner managed businesses, many of which are enterprising families. It wasn't until taking the FEA Program in 2021 that I realized that being the trusted advisor to a family enterprise means much more than just answering technical legal questions. As an FEA, I can now speak to both the technical aspects of estate planning and ask probing questions that make clients think deeper about the decisions they are making and the lasting impact they will have on the family as a system."

Elise Pulver, LLB, TEP, FEA, Principal, Wealth Planning
TD Wealth Family Office

[Learn More](#)

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](#)

Membership List Email Scams

Several members have recently reported receiving an email trying to sell them STEP member data. These emails are scams and STEP does not sell its membership lists. The company sending these emails has no affiliation with STEP and has never received a copy of our data. Should you receive one of these emails, we encouraged you to block the sender.

Searchable Resource Tool

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 almost 10,000 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 2023-24 Branch/Chapter Bundles and the 2024 National Conference.

Members can access the SRT by logging into their MY STEP account.



[Login to MY STEP](#)

STEP Global Congress 2025

You can now book tickets for the next STEP Global Congress, which will be taking place in Rome, Italy on February 25 and 26, 2025. Congress will address the challenges and opportunities presented by the next generation of wealth holders; the fight against economic crime; and the debate over implementing a global wealth tax, offering diverse perspectives on potential impact and feasibility.

[Details & Registration](#)

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

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	March 3, 2025	February 3, 2025
STEP Canada Diploma Program All Courses	May 26, 2025	March 1, 2025

Updates

DIPLOMA PROGRAM

The grade release date for those who wrote their exam on November 4th, 2024 is **December 5th, 2024**. Students will receive an email notification when their grades are available in their MY STEP account, under "My Courses & Marks." If you wish to register for your next course before receiving your current course grade, you may do so through provisional registration.

Connect With Us on LinkedIn

Check out one of our recent LinkedIn posts:



We're taking some time to look back at the 2024 STEP Canada-USA Cross-Border Conference, and want to thank our 200+ delegates, remarkable speakers, and dedicated staff for an incredible few days of connecting, learning, and engaging.

We are proud to have received such positive feedback from our registered delegates. Hear what our attendees have said:

- *Good combination of professionals from multiple disciplines. Networking setup and frequency was good and easy to mingle. Location was nice. Content was great.*
- *I liked that there was such a thoughtful effort to give equal voice and weight to Canadian and US laws/issues.*
- *The conference was well organized with a professional, friendly atmosphere. All of the content was informative, relevant and a great learning opportunity. Good to constantly update and refresh information and knowledge.*
 - *The topics, in general, were very well chosen and addressed. I also enjoyed the socializing!*

We extend a special thank you to our generous sponsors who made this unique experience possible. We encourage everyone to learn more about these organizations who support STEP and our community via the link below:

<https://cvent.me/P4KdoD?RefId=Eblast>

For more posts like this, 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

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 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

[STEP Canada Website](#)

[STEP Member Directory](#)

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