



insider



E-Newsletter Vol. 11 | Issue 10 | October 10, 2023

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!



Now Available:

Final Questions & Answers from the 2023 STEP Canada / CRA Roundtable

Our highly anticipated 2023 STEP Canada / CRA Roundtable session was presented on Tuesday, June 20th. During this session, senior CRA representatives answered questions submitted by trust and estate professionals regarding specific cases and general issues of concern for both practitioners and their clients.

We are pleased to deliver the final 2023 STEP Canada / CRA Roundtable Questions & Answers to STEP Canada members and conference delegates. In addition, STEP Canada members can access this resource in their My STEP Canada Portal under the Resource Box, after logging on to step.ca.

[Access the 2023 STEP/CRA Roundtable Q&As](#)



Our branches and chapters have an exciting lineup of unique and timely technical seminars for the 2023-24 education season! We remain committed to creating opportunities for our members to expand their knowledge and professional networks.

BEST VALUE: Take advantage of six seminars worth of in-depth content, valuable collaboration, networking opportunities, and accessible continuing education (CPD/CE) credits by registering for a **2023-24 Hybrid Branch/Chapter Bundle**.

Our members and delegates have the option of (A) attending seminars live in person or (B) viewing the seminar replays from the comfort of your home or office three business days later. Those who attend in person can interact with speakers during a live Q&A following the technical presentation. This Q&A will be recorded and available as part of the on-demand service.

In addition to the four local seminars, STEP Canada will offer two national seminars covering essential topics to all practitioners in January and February, which will be broadcast online to all Branch & Chapter Bundle delegates nationwide.

As an alternative to a Bundle, STEP Canada is pleased to offer our delegates the ability to select individual seminars (not applicable to online national seminars). Registration to individual seminars allows for in-person attendance only and does not provide app access or replay viewing.

[Details & Registration](#)

AVAILABLE NOW

CLIENT SERVICE RESOURCE
A GUIDE FOR
ASSISTING PERSONS
IN VULNERABLE
SITUATIONS



An increasing number of STEP Canada members are encountering clients in vulnerable situations, including those who are unduly influenced or are at risk of financial, physical, or psychological harm.

Through the dedicated efforts of the STEP Canada Public Policy Committee (PPC) and a sub-committee of industry experts, we are proud to release, **[“Client Service Resource: A Guide for Assisting Persons in Vulnerable Situations.”](#)**

It’s a must-read for members, as it will help navigate the complexities of assisting clients in vulnerable situations, provide case studies that illustrate fact-based examples, and conclude with an extensive list of valuable resources.

This publication is available to all STEP Canada members through the link provided above and will also be posted in your online member account. We encourage you to share this guide with your professional network.

Client Service Resource: A Guide for Assisting Persons in Vulnerable Situations

NEW - STEP Canada Discover Brochure



STEP Canada is pleased to release an updated brochure detailing the world of benefits with STEP Canada, following our relaunched branding guidelines.

As part of STEP's global community of more than 21,000 members, STEP Canada represents nearly 3500 trust and estate professionals who help families and individuals plan for their best possible futures. Through our network of 11 branches and chapters nationwide, we uphold STEP's global standards and administer the TEP designation that recognizes the leading professionals in the field. To continue their development, we provide members with opportunities to advance their skill sets and connect with others in the industry.

If you have a colleague you think would be interested in, or benefit from STEP membership, you can share this brochure with them and invite them to contact our Member Services team at memberservices@step.ca for more information on how to join.

[View the New Discover Brochure](#)

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 anytime	Exams must be completed within 6 months of registering
CETA 2-4	March 4, 2024	February 4, 2024
STEP Canada Diploma Program	November 6, 2023 May 29, 2024	Registration Closed March 1, 2024
Essay Submission	October 1, 2023	

Updates

Diploma Program

Instructor tutorials will be taking place for each of the diploma courses in October. Check your course website for your specific date and time. The registration link and case study questions that will be reviewed are under the "Instructor Tutorial" section. These sessions include Q&A time with your instructor; attendance is strongly encouraged. The tutorials will be recorded for those that cannot attend.

NEW: Attendance will be taken for the tutorials and may be used towards CPD hours (students should check with their respective professional bodies on applicability).

An exam procedures meeting will take place on **Thursday, October 12, 2023** from **12pm– 1pm ET**. The registration link is posted on your course website. This session will be recorded and available on your course website should you not be able to attend.

Reminder that the diploma program exam date is **Monday, November 6, 2023**. Good luck to all students writing on this day.

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

Upcoming Branch & Chapter Events

STEP Winnipeg

Branch Bundle Seminar
October 10, 2023
12:00pm - 2:00pm CT
Del Crewson Conference
Centre, Winnipeg

STEP Toronto

Branch Bundle Seminar
October 11, 2023
3:00pm - 5:00pm ET
Gowling WLG (Canada)
LLP, Toronto

STEP Okanagan

Chapter Bundle Seminar
October 17, 2023
3:00pm - 5:00pm PT
BMO Private Wealth
Office, Kelowna

STEP Montreal

Branch Bundle Seminar
October 18, 2023
12:00pm - 2:00pm ET
Borden Ladner Gervais
LLP, Montreal

STEP Atlantic

Branch Bundle Seminar
October 19, 2023
2:30pm - 4:30pm AT
Stewart McKelvey, Halifax
(plus satellite locations)

STEP Edmonton

Branch Bundle Seminar
October 19, 2023
4:00pm - 6:00pm MT
Manulife Place, 3rd Floor,
Edmonton

STEP Calgary

Branch Bundle Seminar
October 24, 2023
7:30am - 9:30am MT
Calgary Petroleum Club,
Calgary

STEP Southwestern Ontario

Chapter Bundle Seminar
October 24, 2023
4:00pm - 6:00pm ET
KPMG LLP, London
(plus satellite locations)

STEP Ottawa

Branch Bundle Seminar
October 25, 2023
3:00pm - 5:00pm ET
Le Germain Hotel Ottawa,
Ottawa

STEP Winnipeg

TEP Talk
November 1, 2023
12:00pm - 1:00pm MT
Zoom

STEP Toronto

STEPping out to Lunch
November 6, 2023
12:00pm - 1:00pm ET
Zoom

STEP Calgary

TEP Talk
November 7, 2023
12:00pm - 1:00pm CT
Zoom

Reminders

All **STEP Canada staff** are working from home until further notice. 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

[Advising Families Canada](#)

[STEP Member Directory](#)

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

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