

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
Supporting trust and estate practitioners
in their pursuit of excellence

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



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](#)

eNews - STEP Canada Tax Technical Committee

RE: Submission relating to the application of the Alternative Minimum Tax (AMT)

The Society of Trust and Estate Practitioners (Canada) sent a submission to Finance Canada on Friday, September 8, 2023 in response to legislative proposals pertaining to the alternative minimum tax (AMT) released on August 4, 2023, and the accompanying explanatory notes (collectively, "Proposals").

The STEP Canada Tax Technical Committee is pleased to share this submission with its members below and in the Member Resource Section of step.ca.

[View Submission](#)

NEW - Taxation of Trusts & Estates Course

The education team at STEP Canada is pleased to announce the launch of our **NEW** Taxation of Trusts & Estates course as of January 1, 2024. The new tax course offers a comprehensive education that lays a strong foundation in tax principles before students engage with the technical aspects of trust and estate taxation.

The new tax course will include:

- A solid foundation of introductory tax concepts,
- plenty of opportunities for application (knowledge checks and practice cases for each chapter),
- expanded evaluation criteria (graded assignment, marked before the exam.),
- two collaborative peer learning sessions,
- access to topic-based student discussion board,
- an interactive instructor-led case tutorial, and
- 4 weeks of access to the Instructor Q&A discussion board.

For students registered into the Taxation of Trusts & Estates course for the November 2023 exam: There is an option for students that defer the November 2023 tax exam to transfer into the new course without a new registration fee (usual deferral fees still apply, where applicable). The transfer will be available only if the deferral is made before the exam on November 6, 2023. Detailed information is posted inside of the tax course website. A reminder that deferrals made with less than 30 days' notice before the exam incur a fee.

An info session with Q&A is being hosted on September 14th at 1pm EST. Follow the button below to register.

[Info Session Registration](#)

STEP Canada Proudly Presents Its 2023-24 Board of Directors

As part of STEP's global community, STEP Canada is dedicated to the field of trust and estates with a distinctive Canadian perspective. We uphold STEP's professional standards, focusing on supporting the future of the profession in Canada. Our national board and committees take a leading role in communicating the views of Canadian members to governments, tax authorities, regulators, and the public.

With a deep appreciation for their vision and leadership, please join us in thanking them for their volunteerism and dedicated support of STEP Canada.

[See Our LinkedIn Post](#)

STEP Canada's 25th Anniversary

In June of this year, STEP Canada was thrilled to celebrate our 25th anniversary! We remain committed, as always, to supporting trust and estate professionals in their pursuit of excellence.

This milestone could not have been achieved without our wonderful community. With 11 branches and chapters, over 3,400 members, and hundreds of volunteers, STEP Canada is able to grow and provide new and exciting education and networking opportunities, while always advocating for this industry.

We invite you to watch our short video highlighting STEP's achievements.

[Watch Our Video](#)

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.

Intermediate - Senior Litigation Lawyers - WEL Partners (Toronto, ON)

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 29, 2024 |
| Essay Submission | October 1, 2023 | |

Updates

Diploma Program

The second Peer Learning session will take place the week of [September 25th](#). The registration link and case study & questions that will be discussed can be found on your course website.

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 of your course website. These sessions include Q&A time with your instructor; attendance is strongly encouraged. The tutorials will be recorded for those that cannot attend.

CETA Program

For those students who wrote their CETA exam on September 6th, course grades will be released on October 5th. An email will be sent to you once grades are available on your MY STEP account. For those students who completed the program, congratulations on this achievement. A certificate will be mailed to you in early 2024. Please ensure your preferred mailing address is updated on your profile.

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 Saskatchewan

September Showcase
September 13, 2023
3:00pm - 5:00pm CST
Parlor YXE, Saskatoon

STEP Calgary

September Showcase
September 14, 2023
4:00pm - 6:00pm MT
Ranchmen's Club,
Calgary

STEP Atlantic

Welcome Back Reception
September 14, 2023
5:00pm - 7:00pm AT
Stewart McKelvey, Halifax

STEP Winnipeg

TEP Talk
September 20, 2023
12:00pm - 1:00pm CT
Zoom

STEP Vancouver

Seminar + Social
September 21, 2023
2:00pm - 5:00pm PT
UBC Robson Square,
Vancouver

STEP Edmonton

September Showcase
September 21, 2023
4:00pm - 6:00pm MT
Manulife Place, Edmonton

STEP Southwestern Ontario

10th Anniversary
Celebration
September 21, 2023
5:00pm - 7:30pm ET
Delta Hotels London
Armouries, London

STEP Toronto

Welcome Back Reception
September 28, 2023
5:30pm - 8:00pm ET
CI Private Wealth, Toronto

STEP Winnipeg

September Showcase

September 28, 2023
4:00pm - 6:00pm CT
Assiniboine Park,
Winnipeg

STEP Montreal

September Showcase

September 28, 2023
4:00pm - 8:00pm ET
Miller Thomson LLP,
Montreal

STEP Okanagan

Social Event

September 29, 2023
4:00pm - 6:00pm PT
BDO Canada LLP,
Kelowna

STEP Saskatchewan

Chapter Bundle Seminar

October 5, 2023
2:00pm - 4:00pm CST
Saskatoon Club,
Saskatoon

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.

STEP Canada

45 Sheppard Avenue East

Suite 510

Toronto, ON M2N 5W9 - Canada

Telephone: 416-491-4949