



insider



Newsletter Vol. 13 | Issue 9 | September 9, 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!

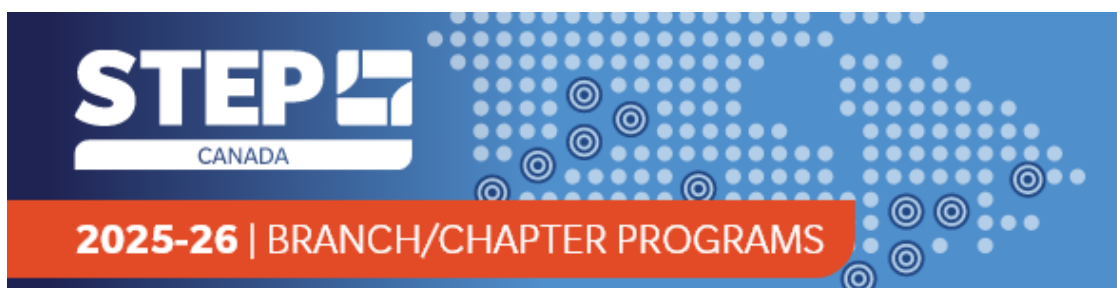
[STEP Canada Website](#)

[STEP Member Directory](#)

[STEP Worldwide Website](#)

[Practitioner Opportunities](#)

Registration Open for 2025-26 Program Season Events



Join Us for an Exciting 2025-26 Program Season!

Your branches & chapters are proud to share the lineup of interesting and engaging events for this program season. Local volunteers have curated a fantastic selection of can't-miss networking opportunities and valuable CPD seminars, designed to support your professional growth and connections!

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 can't wait to welcome you to these events!

For more information, click the link below and select your branch or chapter.

[2025-26 Seminars & Events](#)

We Want to Hear From You



Contribute to the 2025 STEP Canada National Conference Program!

The 2026 National Conference Program Committee welcomes proposals for conference sessions from all members.

To be considered by the committee, please send in your session proposal to Janis Armstrong, jarmstrong@step.ca, by **October 31, 2025**.

Congratulations to STEP Saskatchewan

Congratulations to STEP Saskatchewan for officially transitioning from a Chapter to a full STEP Branch!

Over the last ten years the leadership and members in Saskatchewan have worked hard to increase its membership base while demonstrating a commitment to elevate the trust and estate community there with strong technical offerings and rich networking opportunities. The national Executive Committee, along with close to 100 industry guests, will celebrate this milestone in **Saskatoon** on **September 15th**, almost on the 10th anniversary of the original chapter launch.

Members and industry professionals are welcome to join for this memorable occasion. The celebration event will include a 20-minute technical panel discussion, along with a lively celebration. More information can be found below.



Details & Registration

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.



Davóg McGlinchey, TEP
RBC Royal Trust
STEP Toronto

"Volunteering for the STEP Toronto Branch has enabled me to build a professional network from scratch, after having moved here from Jersey in 2018. It has also helped me develop additional skills that I may not get exposure to in my day-to-day role and reminds me of the importance of adopting a more multidisciplinary thought process to matters relating to our industry."

I would encourage any member who is interested in getting more involved with STEP to reach out to your local branch/chapter committee or to STEP National to identify opportunities that match your skill set or those skills you wish to develop.

Like most things in life you get out of something what you put in and I feel the Society is better with the diversity of thought our members can bring through volunteering and being actively involved."

Davóg is currently Chair of the STEP Canada Member Services Committee, a Member-at-Large on the STEP Toronto Branch Board, and a volunteer for the STEP Canada Awards Committee.

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.

Find Your Local Board Members

Notice: 2025 STEP CPD Audit Review

The 2025 Continuing Professional Development (CPD) Audit Review began on August 27, 2025, and the 62 randomly selected STEP Canada members were contacted by email. Undertaking and recording CPD activities is a requirement for maintaining your membership, and it is recommended that all members maintain a record of their CPD activities and reflective practice throughout the year to ensure that, should you be chosen to submit your CPD records for review, you can easily comply with the audit requests.

Members who are retired, on maternity or long-term leave, should apply for Retired or Restricted Membership to ensure that their membership records are up to date. Once approved, this will avoid selection for the audit as you will be entitled to a CPD exemption.

Deadline approaching: Selected members have until October 27, 2025 to submit their CPD records.

If you have questions or concerns, please contact the CPD Team at CPD@step.org.

Learn More About STEP's CPD Policy

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 it's membership and their professional outcomes.

Did you know we apply for CPD accreditation from these bodies?

- Alberta Insurance Council (AIC) - *if applicable**
- FP Canada
- The Financial Services Regulatory Authority of Ontario (FSRA)
- The Institute for Advanced Financial Education (IAFE)
- Insurance Council of Manitoba (ICM) - *if applicable**
- Law Society of British Columbia (LSBC)
- Law Society of Ontario (LSO) - *if applicable***
- Canadian Investment Regulatory Organization (CIRO) - formerly MFDA

**if seminar is based on insurance*
***only for professionalism hours*

The following bodies recognize STEP activity for continuing education credits with no formal accreditation application required, and the standard issued CPD certificate for verification of hours will suffice for your records:

- Law Societies of Nova Scotia, New Brunswick, Prince Edward Island, and Newfoundland and Labrador
- Barreau du Québec and the Chambre des notaires du Québec
- Law Society of Ontario - *for substantive hours*
- Law Society of Manitoba
- Law Society of Saskatchewan
- Law Society of Alberta
- Law Society of British Columbia - *for substantive hours*
- Chartered Professional Accountants (CPA)
- Society of Trust and Estate Practitioners (STEP)

If you have questions relating to your CPD certificates or would like more information, please email memberservices@step.ca.

Coming Soon: New Marketing Brochures for Clients

STEP Canada's five marketing brochures, "Why Choose a Professional With a TEP Designation?", "Why Make an Enduring Power of Attorney?", "Why Make a Trust?", "Why Make a Will?", and "Why the 'Four C's' of Elder Law are Important to You", have been refreshed!

These brochures, prepared by STEP Canada to assist you in promoting your specialized knowledge and services to your clients, have been updated to reflect current statistics, trends, language, and branding.

Members of STEP Canada can purchase these brochures at cost from the National Office. Summaries and pricing will be available shortly.

Stay tuned for more information.



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	CETA exams will be on-demand starting January 2026	Registration open on a rolling basis

**STEP Canada
Diploma Program
All Courses**

November 3, 2025
May 25, 2026

CLOSED
March 1, 2026

Essay Submission

October 1, 2025

[2025 topics can be found here](#)

Updates

CETA - Certificate in Estate & Trust Administration

We are pleased to announce that as of January 2026 all CETA exams will be delivered via an online on-demand format.

- **No set exam dates** - Take your exam anytime, day or night, when you are ready (within 12 months of registration)
- **Convenient access** - The exam link will be located in your online learning platform, and all you will need to do is click the link to start
- **Self-paced learning** - Progress through the course and program at a speed that's comfortable for you, with the flexibility to manage your own study schedule

Diploma Program

The tutorial session registration links and the Instructor Q&A Board dates are all posted in your classroom.

NEW Certificate Program Coming Soon

Investment Basics for Fiduciaries

This program covers essential investment knowledge for administering estates, trusts, and managing the financial affairs of incapable persons. Pre-registration opening soon!

By connecting investment fundamentals to real-world fiduciary decision-making, this course empowers professionals to navigate their responsibilities with confidence and compliance.

- **Fiduciary Roles & Responsibilities** - Master the key duties of executors, trustees, and decision-makers for incapable clients
- **Investment Fundamentals** - Develop a foundation in investment principles tailored to fiduciary management
- **Legal & Tax Considerations** - Understand the legal and tax framework that guides fiduciary investment decisions
- **Real-World Case Studies** - Apply your knowledge to practical fiduciary scenarios for informed, responsible decision-making

Connect with our Education Team at education@step.ca if you are interested in learning more.

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 13,000 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 2024-25 Branch Bundle seminars.

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



Login to MY STEP

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.

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