



CPD/CE Accreditation List

Bundle delegates can fulfil their STEP CPD requirements by attending sessions that are in line with their reflective development goals. The program is also designed to meet the continuing education requirements for provincial law societies, governing bodies, and professional associations by offering up to ***11.00 hours** of substantive continuing professional development (CPD). A breakdown of the approved accredited CPD/CE information is outlined below as of **July 31, 2024**. In order to obtain these credit(s), delegates who attended in-person must sign in upon their arrival at the venue. Delegates who viewed the on-demand replays must view the seminar(s) in full length and complete the quiz at the end of the seminar.

Branch/Chapter	Original Broadcast Date	Bundle Seminars	Credits/Hours	Accrediting Bodies					
				FP Canada	The Institute for Advanced Financial Education (IAFE)	Alberta Insurance Council (AIC)	Insurance Council of Manitoba (ICM)	Law Society of British Columbia	Law Society of Saskatchewan
National	January 17, 2024	Better Breadcrumbs: Assisting Clients in Preparing A Clear, All-Inclusive and Tax Efficient Road Map for Their Fiduciaries and Families	2.00	Y	Y	N/A	Y	Y	N/A
National	February 22, 2024	What to Do When Things Go Off the Rails – A Cross-Provincial Examination of Capacity Disputes	1.75	Y	Y	N/A	N/A	Y	N/A
Atlantic	October 19, 2023	Fiduciary Accounting	1.75	Y	Y	-	-	-	-
Atlantic	November 30, 2023	Navigating the Complexity of Disability Planning	1.50	Y	Y	-	-	-	-
Atlantic	March 21, 2024	Planning Outside the Will	2.00	Y	Y	-	-	-	-
Atlantic	May 16, 2024	The Executor's Full Monty	2.00	Y	Y	-	-	-	-
Calgary	October 24, 2023	Family Learning and Development	1.50	Y	Y	N/A	-	-	-
Calgary	November 23, 2023	Tax Update	1.75	Y	Y	Y	-	-	-
Calgary	April 10, 2024	Effective and Efficient Ways to Use ADR to Resolve an Estate Case & Case Law Update	2.00	Y	Y	N/A	-	-	-
Calgary	May 28, 2024	Hot Topics in Insurance Planning	2.00	Y	Y	N/A	-	-	-
Edmonton	October 19, 2023	Farm Succession Planning	1.00	Y	Y	N/A	-	-	-
Edmonton	November 16, 2023	Issues in Estate Litigation	1.25	Y	Y	N/A	-	-	-
Edmonton	April 18, 2024	Is the Risk Worth the Reward? "Aggressive" Tax Strategies With Insurance Planning	2.00	Y	Y	N/A	-	-	-
Edmonton	May 16, 2024	Doing Deathcare Differently	1.00	Y	Y	N/A	-	-	-

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Montreal	October 18, 2023	Surviv des principales modifications législatives en matière de protection des personnes vulnérables	1.25	Y	Y	-	-	-	-
Montreal	November 30, 2023	Impôt sur le revenu fractionné (IRF) particulièrement dans une optique successorale	1.00	Y	N/A	-	-	-	-
Montreal	March 21, 2024	Jurisprudence civile/ Civil Jurisprudence	1.50	Y	Y	-	-	-	-
Montreal	May 9, 2024	Évaluation d'entreprise – du gel successoral, au contexte familial, au décès : (i) théorie; (ii) jurisprudence; et (iii) positions administratives	1.50	Y	Y	-	-	-	-
Okanagan	October 17, 2023	Doing Good Well: Maximizing your Client's Charitable Impact	1.50	Y	Y	-	-	Y	-
Okanagan	November 21, 2023	Planning for Succession within Agricultural Businesses	1.00	Y	Y	-	-	Y	-
Okanagan	April 16, 2024	Beautiful BC - Except When You Die? Estate Planning Issues and Opportunities for BC/Alberta Families	1.50	Y	Y	-	-	Y	-
Okanagan	May 21, 2024	Cross-Border Inheritances: Common Traps	1.50	Y	Y	-	-	Y	-
Ottawa	October 25, 2023	Planning Principles for Non-principal Residences	1.00	Y	Y	-	-	-	-
Ottawa	November 22, 2023	The ABC's of Trust Reporting and Mandatory Transaction Reporting	1.00	Y	Y	-	-	-	-
Ottawa	March 20, 2024	Trusts 201: Basics and Beyond	1.50	Y	Y	-	-	-	-
Ottawa	May 22, 2024	Tax Efficient Planning Strategies for People with Disabilities	1.75	Y	Y	-	-	-	-
Saskatchewan	October 5, 2023	Selected Issues Pertaining to Taxation at Death	1.50	Y	Y	-	-	-	Y
Saskatchewan	November 8, 2023	Working with a Trust Company	1.50	Y	Y	-	-	-	Y

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Saskatchewan	April 24, 2024	Interspousal Agreements: An Important Estate Planning Tool	1.25	Y	Y	-	-	-	N/A
Saskatchewan	May 28, 2024	Driven by Purpose: Working With Donors to Create Estates With High Charitable Impact	1.50	Y	Y	-	-	-	N/A
SWO	October 24, 2023	Anatomy of a Tax Appeal	2.00	Y	Y	-	-	-	-
SWO	November 21, 2023	New Trust Reporting Rules	1.75	Y	Y	-	-	-	-
SWO	April 16, 2024	Identifying the Time to Safeguard a Decision-Maker's Interests and Strategies to Begin the Conversation	2.00	Y	Y	-	-	-	-
SWO	May 21, 2024	Unlocking the Power of Conation in Family Business Transitions	1.00	Y	Y	-	-	-	-
Toronto	October 11, 2023	Probate Planning – Is It Still Worth the Hype?	2.00	N/A	N/A	-	-	-	-
Toronto	November 15, 2023	Artificial Intelligence – Can It Do Your Work for You?	1.75	Y	Y	-	-	-	-
Toronto	April 17, 2024	Foreign Beneficiaries of Canadian Estates and Trusts (Middle East, UK and East Asia) – Risks, Opportunities and Rewards	1.75	Y	TBA	-	-	-	-
Toronto	May 14, 2024	Let's Hit the Highlights – In Case You Missed It	1.75	Y	Y	-	-	-	-
Vancouver	September 21, 2023	The Power and the Glory: What Powers Do Fiduciaries Have, and How Are Those Balanced and Administered?	1.75	Y	Y	-	-	Y	-
Vancouver	November 23, 2023	A Brave New (and Old) World: Recent Developments in the Trust Context, Including Specific Purpose Trusts, and Litigation Relating to Trusts	1.50	Y	Y	-	-	Y	-
Vancouver	April 4, 2024	It's All Good!" ... Until It's Not: A Panel Discussion on the Treatment of Trusts on Separation and Divorce, and the Impact of Family Law Considerations on Trust Planning, Drafting and Administration	1.50	Y	TBA	-	-	Y	-

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Vancouver	May 23, 2024	The Wind in the Willows: Updates and Reflections on Tax and Trust Changes in the Planning and Litigation Context Over the Past Step Year	1.75	Y	Y	-	-	Y	-
Winnipeg	October 10, 2023	Planning for Blended Families	1.50	Y	Y	-	Y	-	-
Winnipeg	November 21, 2023	Powers of Attorney, Drafting, Litigating and Investment Obligations	1.50	Y	Y	-	Y	-	-
Winnipeg	April 16, 2024	Creditor and Family Law Protection With Trusts: Review of Trusts Through Family Law Lens	1.50	Y	Y	-	Y	-	-
Winnipeg	May 28, 2024	Tax Planning Upon the Death of a Business Owner	1.00	Y	Y	-	Y	-	-

** The following institutions do not require accreditation:

- Barreau de Quebec
 - Chambre des notaires du Québec
 - CPA Canada
 - Law Society of Alberta
 - Law Society of Manitoba
 - Law Society of New Brunswick
- Law Society of Newfoundland and Labrador
 - Law Society of Nova Scotia
 - Law Society of Ontario
 - Law Society of Prince Edward Island
 - Law Society of Saskatchewan (starting 2024)
 - Society of Trust and Estate Practitioners (STEP)

**Delegates who report their credits/hours to these institutions, must use credits/hours indicated in the chart above.

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