



2026-27 EDUCATION SEMINARS & EVENTS

SEPTEMBER 2026 BUNDLE SEMINAR – LOCAL EVENT

Send Me Your File | Speaker: Justice Stephen J. Doucet, LLB, Miramichi: The New Brunswick Court of King's Bench

Join us in welcoming Justice Stephen Doucet, Judge of the Court of King's Bench of New Brunswick, Trial Division to give us tales from the Bench in contested and contentious estates – from all sides. Professionals might take away what makes a “good” client file.

SEPTEMBER 2026 SEPARATE FROM BUNDLE

Welcome Back Reception | *Social Event*

NOVEMBER 2026 BUNDLE SEMINAR – LOCAL EVENT

Local Finance Roundtable | Speaker: Kenneth Keung, CPA, CA, CPA (Colorado), CFP, MTax, LLB, TEP, Victoria: Doane Grant Thornton LLP

Join Kenneth Keung in diving into the implications of legislative changes and considerations from the Department of Finance, and the many

JANUARY 2027 BUNDLE SEMINAR – LOCAL EVENT

Common Misconceptions in Estate Planning | Speakers: TBA

We've all seen it – an adult child is added to their aging parents' bank account, and all involved pat themselves on the back for an estate well-planned. Our panelists will consider those common planning misconceptions, their consequences, and how we as STEP practitioners can ensure they are avoided by our clients.

MARCH 2027 SEPARATE FROM BUNDLE

National Full-Day Course: Taxation at Death and Post Mortem Planning

Speakers: Chris Ireland, CPA, CA, TEP, Vancouver: Tellian Management Co. Ltd. & Kenneth Keung, CPA, CA, CPA (Colorado), CFP, MTax, LLB, TEP, Victoria: Doane Grant Thornton LLP

MARCH 2027 BUNDLE SEMINAR – LOCAL EVENT

Incapacity Planning Considerations | Speakers: TBA

Join Elder Law specialists as they consider critical components of planning for incapacity. This will highlight the importance of those oft-overlooked “simple” documents, like Powers of Attorney, substitute healthcare decision-making powers, & guardianship appointments, and demonstrate how they interact.

MAY 2027 BUNDLE SEMINAR – LOCAL EVENT

Pick Your Poison – Probate Taxes vs. The Rest | Speakers: Robbie Brown, CPA, CA, CFP, TEP, Halifax: Scotia Wealth Management; Benjamin Carver, LLB, TEP, Bridgewater: Carver Estate Law & Litigation; Amanda Doucette, LLB, LLM, TEP, Saskatoon: Stevenson Hood Thornton Beaubier LLP

Perhaps you've avoided one tax bill – but have you created another? Amanda Doucette, Robbie Brown, and Benjamin Carver will take us through the tax consequences of probate planning, highlighting who ends up with which tax bill, how pitfalls can be avoided, and the differences across the Atlantic Provinces.

MAY 2027 BUNDLE SEMINAR – LOCAL EVENT

Sparkling Reception & Annual Branch Meeting | *Social Event*

Wednesday, September 16, 2026 @ 2:30 pm AT
Stewart McKelvey Offices Across the Atlantic Provinces

Wednesday, September 16, 2026 @ 5:00 pm AT
Stewart McKelvey, Queen's Marquee, 600-1741 Lower Water Street, Halifax

Thursday, November 19, 2026 @ 2:30 pm AT
Stewart McKelvey Offices Across the Atlantic Provinces

Thursday, January 28, 2027 @ 2:30 pm AT
Stewart McKelvey Offices Across the Atlantic Provinces

Friday, March 5, 2027 @ 8:00 am AT
Halifax - Venue TBA

Thursday, March 25, 2027 @ 2:30 pm AT
Stewart McKelvey Offices Across the Atlantic Provinces

Thursday, May 13, 2027 @ 2:30 pm AT
Stewart McKelvey Offices Across the Atlantic Provinces

Thursday, May 13, 2027 @ 5:00 pm AT
Halifax - Venue TBA

STEP Atlantic Board Members are busy planning the 2026-27 program season and encourage you to save these dates! Details and registration will be available in August.

SAVE THE DATE!

29th National Conference on June 7-8, 2027
Visit step.ca for complete details and registration information.