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STEP CANADA
Supporting trust and estate practitioners in their pursuit of excellence

2026-27 EDUCATION SEMINARS & EVENTS

SEPTEMBER 2026 — INCLUDED IN BUNDLE

Tuesday, September 15, 2026 @ 3:30 pm MT
Calgary Petroleum Club, 319 5th Avenue SW, Calgary

Welcome Back Seminar and Social: Case Law Update
Speakers: Shannon James, JD, LLL, TEP, Calgary: Carscallen LLP

NOVEMBER 2026 — BUNDLE SEMINAR – LOCAL EVENT

Wednesday, November 18, 2026 @ 12:00 pm MT
Calgary Petroleum Club, 319 5th Avenue SW, Calgary
Includes Lunch

Considerations When Dealing with Non-Resident Representatives, Beneficiaries and Assets
Speakers: Eleanor Carlson, JD, MBA, TEP, Calgary: Carbert Waite; Nadia Hubocan, LLM, TEP, Calgary: Moody's Private Client; Philip Mei, CPA, CGA, CPA (North Dakota), TEP, Calgary: Doane Grant Thornton LLP

JANUARY 2027 — BUNDLE SEMINAR – LOCAL EVENT

Tuesday, January 26, 2027 @ 12:00 pm MT
Calgary Petroleum Club, 319 5th Avenue SW, Calgary
Includes Lunch

Registered Accounts Before and After Death: Planning, Pitfalls and Practical Solutions
Speakers: Aaron Hector, CFP, RFP, TEP, Calgary: TIER Wealth; Athenea O'Bryan, LLB, JD, RRC, TEP, Calgary: IG Wealth Management

FEBRUARY 2027 — SEPARATE FROM BUNDLE

Thursday, February 4, 2027 @ 8:00 am MT
Venue TBA

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

FEBRUARY 2027 — BUNDLE SEMINAR – LOCAL EVENT

Wednesday, February 24, 2027 @ 12:00 pm MT
Calgary Petroleum Club, 319 5th Avenue SW, Calgary
Includes Lunch

Tax Update
Speakers: Kim Moody, FCPA, FCA, TEP, Calgary: Moody's Tax / Moody's Private Client

APRIL 2027 — BUNDLE SEMINAR - LOCAL EVENT

Tuesday, April 6, 2027 @ 12:00 pm MT
Calgary Petroleum Club, 319 5th Avenue SW, Calgary
Includes Lunch

Protecting the Vulnerable Beneficiary: Henson Trusts, RDSPs and Benefit Preservation in Post-2026 Alberta
Speakers: Gordon VanderLeek, LLB, TEP, Calgary: VanderLeek Law; Maya Claire Gordon, LLB, TEP, Edmonton: Reynolds Mirth Richards & Farmer

MAY 2027 — SEPARATE FROM BUNDLE

Wednesday, May 5, 2027 @ 4:00 pm MT
The Ranchmen's Club, Bennett Room, Cochrane Lounge, 710 13 Ave SW

Social Event, Annual Branch Meeting, and Special Presentation
Speakers: TBA

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