



2026-27 EDUCATION SEMINARS & EVENTS

SEPTEMBER 2026 INCLUDED IN BUNDLE

Welcome Back Seminar and Social: Case Law Update

Speakers: Shannon James, JD, LLL, TEP, Calgary: Carscallen LLP

Tuesday, September 15, 2026 @ 3:00 pm MT

Calgary Petroleum Club, 319 5th Avenue SW, Calgary

NOVEMBER 2026 BUNDLE SEMINAR – LOCAL EVENT

Considerations When Dealing with Non-Resident Representatives, Beneficiaries and Assets

Speakers: Eleanor Carlson, JD, MBA, TEP, Calgary: Carbert Waite; Nadia Hubocan, JD, LLM, TEP, Calgary: Moody's Private Client; Philip Mei, CPA, CGA, CPA (North Dakota), TEP, Calgary: Doane Grant Thornton LLP

Wednesday, November 18, 2026 @ 12:00 pm MT

Calgary Petroleum Club, 319 5th Avenue SW, Calgary

Includes Lunch

JANUARY 2027 BUNDLE SEMINAR – LOCAL EVENT

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

Tuesday, January 26, 2027 @ 12:00 pm MT

Calgary Petroleum Club, 319 5th Avenue SW, Calgary

Includes Lunch

FEBRUARY 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

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

Venue TBA

FEBRUARY 2027 BUNDLE SEMINAR – LOCAL EVENT

Tax Update

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

Wednesday, February 24, 2027 @ 12:00 pm MT

Calgary Petroleum Club, 319 5th Avenue SW, Calgary

Includes Lunch

APRIL 2027 BUNDLE SEMINAR - LOCAL EVENT

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

Tuesday, April 6, 2027 @ 12:00 pm MT

Calgary Petroleum Club, 319 5th Avenue SW, Calgary

Includes Lunch

MAY 2027 SEPARATE FROM BUNDLE

Social Event, Annual Branch Meeting, and Special Presentation

Speakers: TBA

Wednesday, May 5, 2027 @ 4:00 pm MT

The Ranchmen's Club, Bennett Room, Cochrane Lounge, 710 13 Ave SW

STEP Calgary 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.