



2026-27 EDUCATION SEMINARS & EVENTS

SEPTEMBER 2026

BUNDLE SEMINAR – LOCAL EVENT

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

BDO Kelowna, Suite 400, 1631 Dickson Avenue, Kelowna

Maximize Your Impact: Advanced Strategies for Effective Gifting *Followed by a social event!*

Moderator: Allisa Wu, JD, TEP, Kelowna: Montgomery Miles and Stone Law Firm | **Speakers:** Robert Hamanishi, Kelowna: Kelowna General Hospital Foundation; Ken Harvey, CPA, CA, Kelowna: MNP LLP; Danny Mah, CFA, Calgary: PearTree Canada

NOVEMBER 2026

BUNDLE SEMINAR – LOCAL EVENT

Tuesday, November 24, 2026 @ 3:00pm PT

BDO Kelowna, Suite 400, 1631 Dickson Avenue, Kelowna

Trusts vs. Modern Alternatives for Protecting Wealth & Family

Moderator: Samantha Ferguson, JD, TEP, Kelowna: Lawson Lundell LLP | **Speakers:** Ross Langford, LLB, TEP, Kelowna: Lawson Lundell LLP & Nicole Watson, CPA, CA, TEP, Kelowna: Watson CPA Services Inc.

JANUARY 2027

SEPARATE FROM BUNDLE

Friday, January 29, 2027 @ 8:00am PT

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

Tuesday, February 16, 2027 @ 3:00pm PT

BDO Kelowna, Suite 400, 1631 Dickson Avenue, Kelowna

Unmasking the Rogue: Advanced Tactics for Elder Law Practitioners

Moderator: Braeden Rahn, JD, TEP, Kelowna: Geoffrey W. White Law Corporation & Clark Wilson LLP | **Speaker:** Amy Mortimore, KC, LLB, Vancouver: Clark Wilson LLP

MAY 2027

BUNDLE SEMINAR – LOCAL EVENT

Tuesday, May 11, 2027 @ 3:00pm PT

BDO Kelowna, Suite 400, 1631 Dickson Avenue, Kelowna

STEP Year in Review: Update on Trust and Estate Matters During 2026-27 STEP Year & Annual Chapter Meeting

Followed by a social event!

Session will be in cooperation with STEP Vancouver

Moderator: Judith Charbonneau Kaplan, LLB, LLM Tax, TEP, Kelowna: Wellington-Altus Private Wealth Inc. | **Speakers:** Kenneth Keung, CPA, CA, CPA (Colorado), CFP, MTax, LLB, TEP, Victoria: Doane Grant Thornton LLP; Stanley Rule, LLB, TEP, Kelowna: Sabey Rule LLP; Geoffrey White, KC, LLB, TEP, Kelowna: Geoffrey W. White Law Corporation & Clark Wilson LLP

STEP Okanagan 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.