



2026-27 EDUCATION SEMINARS & EVENTS

SEPTEMBER 2026 SEPARATE FROM BUNDLE

September STEPping Out Social | [Social Event](#)

Wednesday, September 9, 2026 @ 4:00 pm ET
KPMG LLP, Suite 1800, 150 Elgin Street, Ottawa

OCTOBER 2026 BUNDLE SEMINAR - LOCAL EVENT

Baby Steps: What You Need to Know About Fertility Law and Estates [Followed by a social reception!](#)
Speaker: Monique Shebbeare, LLB, Vancouver: TD Wealth

Wednesday, October 7, 2026 @ 4:00 pm ET
KPMG LLP, Suite 1800, 150 Elgin Street, Ottawa

NOVEMBER 2026 BUNDLE SEMINAR - LOCAL EVENT

AMT for Inter Vivos/Life Interest Trusts [Followed by a social reception!](#)
Speaker: Melissa Plunkett, MFA-P, TEP, Ottawa: Scotia Wealth Management

Wednesday, November 4, 2026 @ 4:00 pm ET
KPMG LLP, Suite 1800, 150 Elgin Street, Ottawa

NOVEMBER 2026 SEPARATE FROM BUNDLE

Student Social | [Social Event](#)

Details TBA

DECEMBER 2026 SEPARATE FROM BUNDLE

Holiday Jingle & Mingle! | [Social Event](#)

Wednesday, December 2, 2026 @ 5:00 pm ET
KPMG LLP, Suite 1800, 150 Elgin Street, Ottawa

JANUARY 2027 BUNDLE SEMINAR - LOCAL EVENT

Bundle Seminar TBA [Followed by a social reception!](#)
Speaker: Nicole Ewing, LLB, CLU, TEP, Ottawa: TD Wealth

Wednesday, January 6, 2027 @ 4:00 pm ET
KPMG LLP, Suite 1800, 150 Elgin Street, Ottawa

FEBRUARY 2027 BUNDLE SEMINAR - LOCAL EVENT

Farm Succession and Taxation [Followed by a social reception!](#)
Speaker: Benoit Legault, CPA, CA, Hawkesbury: MNP LLP

Wednesday, February 3, 2027 @ 4:00 pm ET
KPMG LLP, Suite 1800, 150 Elgin Street, Ottawa

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

Thursday, March 11, 2027 @ 8:00 am ET
Venue TBA

MAY 2027 BUNDLE SEMINAR - LOCAL EVENT

Bundle Seminar TBA & Annual Branch Meeting [Followed by a social reception!](#)
Speakers: Jessica Houle, LLL, JD, Ottawa: Pryor Tax Law & Ian Pryor, LLB, TEP, Ottawa: Pryor Tax Law

Wednesday, May 5, 2027 @ 4:00 pm ET
KPMG LLP, Suite 1800, 150 Elgin Street, Ottawa

STEP Ottawa 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.