SOUTHWESTERN ONTARIO CHAPTER | EST. 2013

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

2026-27 EDUCATION SEMINARS & EVENTS

SEPTEMBER 2026 — SEPARATE FROM BUNDLE

Wednesday, September 23, 2026 @ 5:00pm ET
Highland Country Club, 1922 Highland Heights, London

Special Welcome Back Kick Off Event with Guest Speaker | *Social Event*
Speaker: Dr. Laura Shoots, MD, MSc, Hamilton: Take Care Together

OCTOBER 2026 — BUNDLE SEMINAR - LOCAL EVENT

Wednesday, October 28, 2026 @ 8:30am ET
Miller Thomson, Suite 300, 115 King Street S, Waterloo
Refreshments and snacks provided

Half Day Event: Estate Planning That Survives Scrutiny
Includes 3 unique sessions on this topic!
Doors Open 8:30 am | Sessions 9:00 am - 12:00 pm ET

FEBRUARY 2027 — SEPARATE FROM BUNDLE

Friday, February 26, 2027 @ 8:00am ET
Cambridge - 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 (CO), CFP, MTax, LLB, TEP, Victoria: Doane Grant Thornton LLP

MARCH 2027 — BUNDLE SEMINAR – LOCAL EVENT

Wednesday, March 3, 2027 @ 8:30am ET
BlueRoots, 102-100 Wellington Street, London
Refreshments and snacks provided

Half Day Event: Administration, Compliance & Continuity
Includes 3 unique sessions on this topic!
Doors Open 8:30 am | Sessions 9:00 am - 12:00 pm ET

MAY 2027 — SEPARATE FROM BUNDLE

Wednesday, May 5, 2027 @ 4:00pm ET
BlueRoots, 102-100 Wellington Street, London

End of Season Social Event & Annual Chapter Meeting | *Social Event*

TEP TALKS

STEP Southwestern Ontario is looking forward to facilitating connection between its members and students through this year's TEP Talks. TEP Talks will be hosted over Zoom on the second Thursday of each month, from September 10th to May 13th.

Don't miss out on these complimentary networking events, watch your inbox or check **step.ca** for more information!

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