



2026-27 EDUCATION SEMINARS & EVENTS

SEPTEMBER 2026

SEPARATE FROM BUNDLE

Welcome Back Reception | *Social Event*

Wednesday, September 16, 2026 @ 5:00pm ET

CI Private Wealth, 2nd Floor, 15 York Street, Toronto

OCTOBER 2026

BUNDLE SEMINAR - LOCAL EVENT

Mind the Gap: Navigating Professional Gray Areas *Followed by a social event!*

Moderator: Alex Kerslake, LLB, LLM, FPFS, CFA, CFP, TEP, Toronto: PwC Canada | **Speakers:** Justin de Vries, LLB, TEP, Toronto: de VRIES LITIGATION LLP; Adam Shapiro, CPA, CA, CFP, CLU, FEA, TEP, Toronto: Chronicle Wealth; Jin Wen, CPA, CA, CPA (Illinois), TEP, Toronto: Ernst & Young LLP

Wednesday, October 28, 2026 @ 4:00pm ET

Gowling WLG, Suite 1600, 100 King Street W, Toronto

NOVEMBER 2026

SEPARATE FROM BUNDLE

Student Event: Educational Networking Session

Tuesday, November 12, 2026 Time TBA

Venue TBA

NOVEMBER 2026

BUNDLE SEMINAR - LOCAL EVENT

Trust Us It Will Be Topical I: Post-Mortem Family Law Claims and How to Avoid Them *Followed by a social event!*

Moderators: Jeanine Lim, MMPA, CPA, CA, TEP, Toronto: Manulife; Nancy Yan, MBA, CPA, CA, TEP, Toronto: Cadesky Tax | **Speakers:** TBA

Wednesday, November 25, 2026 @ 4:00pm ET

Gowling WLG, Suite 1600, 100 King Street W, Toronto

JANUARY 2027

BUNDLE SEMINAR - LOCAL EVENT

Trust Us It Will Be Topical II *Followed by a social event!*

Moderator: Jessica Feldman Chittley, LLB, TEP, Toronto: Bales Beall LLP | **Speakers:** TBA

Monday, January 18, 2027 @ 4:00pm ET

Gowling WLG, Suite 1600, 100 King Street W, Toronto

JANUARY 2027

SEPARATE FROM BUNDLE

Blue Monday | *Social Event*

Monday, January 18, 2027 @ 5:30pm ET

Venue TBA

FEBRUARY 2027

SEPARATE FROM BUNDLE

Student Event: Next-Gen

Thursday, February 4, 2027 Time TBA

Venue TBA

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 25, 2027 @ 8:00am ET

Venue TBA

APRIL 2027

BUNDLE SEMINAR - LOCAL EVENT

Interactive Case Study Workshop *Followed by a social event!*

Moderator: Marni Pernica, LLB, TEP, Toronto: Aird & Berlis LLP | **Speakers:** TBA

Thursday, April 8, 2027 @ 4:00pm ET

Gowling WLG, Suite 1600, 100 King Street W, Toronto

MAY 2027

SEPARATE FROM BUNDLE

Student Event: Educational Session

Thursday, May 6, 2027 Time TBA

Venue TBA

MAY 2027

SEPARATE FROM BUNDLE

End of Year Social Event & Annual Branch Meeting | *Social Event*

Tuesday, May 11, 2027 @ 5:00pm ET

Venue TBA

STEP Toronto 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.