



2026-27 EDUCATION SEMINARS & EVENTS

SEPTEMBER 2026

SEPARATE FROM BUNDLE

Monday, September 14, 2026 @ 2:45pm PT

Delta Hotels Victoria Ocean Pointe Resort, 100 Harbour Rd, Victoria

Special Chapter Launch Event! The Perils of Being a Personal Representative: A Panel Discussion of the Top Ten Estate Administration Headaches for Executors, Administrators and their Advisors & Networking Reception

Moderator: Dawn Tipton, CPA, CA, TEP, Victoria: Doane Grant Thornton LLP; Chair, STEP Vancouver Island

Speakers: Alana Bryce, CFP, MTI, Victoria: BMO Trust Company; Dwight Dee, LLB, TEP, Miller Thomson LLP; Kenneth Keung, CPA, CA, CPA (Colorado), CFP, MTax, LLB, TEP, Victoria: Doane Grant Thornton LLP

NOVEMBER 2026

BUNDLE SEMINAR - LOCAL EVENT

Thursday, November 5, 2026 @ 3:00pm PT

Doane Grant Thornton LLP, 650-1675 Douglas Street, Victoria

Medical Assistance in Dying (MAiD): Legal, Tax, and Estate Planning Considerations for Trust & Estate Professionals

Speakers: Colin Flannigan, JD, Kelowna: FH&P Lawyers LLP; Tamara MacIntyre, MSc, DC, DNM, EOLD, Victoria: MAiDHouse

JANUARY 2027

BUNDLE SEMINAR - LOCAL EVENT

Thursday, January 21, 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

MARCH 2027

SEPARATE FROM BUNDLE

Thursday, March 4, 2027 @ 3:00pm PT

Doane Grant Thornton LLP, 650-1675 Douglas Street, Victoria

A Year in Review

Moderator: Kirk O'Brien, MBA, CPA, CMA, CFP, FEA, TEP, Victoria: BMO Private Wealth

Speakers: Jennifer Leach Sandford, LLB, TEP, Victoria: Horne Coupar LLP; Pam Smith, CPA, CA, TEP, Victoria: MNP LLP; Dawn Tipton, CPA, CA, TEP, Victoria: Doane Grant Thornton LLP

MAY 2027

BUNDLE SEMINAR - LOCAL EVENT

Thursday, May 6, 2027 @ 3:00pm PT

Doane Grant Thornton LLP, 650-1675 Douglas Street, Victoria

Empowering Choices: Estate and Financial Planning for Clients and Beneficiaries with Disabilities & Annual Chapter Meeting

Moderator: Jennifer Leach Sandford, LLB, TEP, Victoria: Horne Coupar LLP

Speakers: Caroline Deane, LLB, Victoria: Horne Coupar LLP; Solana Vannus, BA, Vancouver: Plan Institute

STEP Vancouver Island 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.