

VANCOUVER

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STEP

CANADA

Supporting trust and estate practitioners
in their pursuit of excellence

2026-27 EDUCATION SEMINARS & EVENTS

SEPTEMBER 2026

BUNDLE SEMINAR - LOCAL EVENT

Avoiding Probate: Planning for and Consequences of Having Assets Pass Outside a Will *Followed by a social event!*

Speakers: Aliya Goldan, CPA, CA, Vancouver: Smythe CPA; Laura Peach, JD, TEP, Vancouver: Legacy Tax + Trust Lawyers; Kelsey Sherriff, JD, Vancouver: Miller Thomson LLP

Thursday, September 24, 2026 @ 3:00pm PT

UBC Robson Square, Room C-300, 800 Robson St, Vancouver

NOVEMBER 2026

BUNDLE SEMINAR - LOCAL EVENT

Where There's No Will, There's Still a Way: Dealing with a B.C. Resident Intestacy

Speakers: Michelle Isaak, LLB, Vancouver: DLA Piper; Heather MacLean, CPA, CGA, Vancouver: McLaren Trefanenko; Alex Northey, LLB, TEP, Vancouver: Concentra Trust

Thursday, November 19, 2026 @ 7:30am PT

UBC Robson Square, Room C-300, 800 Robson St, Vancouver

Breakfast Included

JANUARY 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

Friday, January 15, 2027 @ 8:00am PT

Venue TBA

JANUARY 2027

BUNDLE SEMINAR - LOCAL EVENT

Disputes with Decision Makers & Passing of Accounts

Speakers: Amy Mortimore, KC, LLB, Vancouver: Clark Wilson LLP; Yolanda Benoit, BComm, Vancouver: The British Columbia Society for the Prevention of Cruelty to Animals (BC SPCA)

Thursday, January 21, 2027 @ 7:30am PT

UBC Robson Square, Room C-300, 800 Robson St, Vancouver

Breakfast Included

MARCH 2027

SEPARATE FROM BUNDLE

Annual Student Lunch

Social Event

Thursday, March 4, 2027 @ 12:00pm PT

Venue TBA

MARCH 2027

BUNDLE SEMINAR - LOCAL EVENT

How Lifetime Agreements Impact Estate Plans: A Review of Cohabitation, Marriage Agreements and Mutual Wills

Preceded by Annual Student Lunch!

Speakers: Ingrid Tsui, LLB, TEP, Vancouver: Alexander Holburn Beaudin & Lang; Amanda Winters, JD, Vancouver: Scion Law LLP

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

UBC Robson Square, Room C-300, 800 Robson St, Vancouver

MAY 2027

BUNDLE SEMINAR - LOCAL EVENT

STEP Year in Review: Update on Trust and Estate Matters During 2026-27 STEP Year & Annual Branch Meeting *Followed by a social event!*

Session will be in cooperation with STEP Okanagan | Moderator: Alexander Demner, JD, TEP, Vancouver: Thorsteinssons LLP

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

Thursday, May 13, 2027 @ 3:00pm PT

UBC Robson Square, Room C-300, 800 Robson St, Vancouver

STEP Vancouver 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.