



2026-27 EDUCATION SEMINARS & EVENTS

SEPTEMBER 2026 SEPARATE FROM BUNDLE

Thursday, September 24, 2026 @ 4:00 CT

SMITH Restaurant - Inn at the Forks, 75 Forks Market Rd, Winnipeg

September Showcase: Focus Group Discussion and Networking Event

OCTOBER 2026 BUNDLE SEMINAR – LOCAL EVENT

Tuesday, October 13, 2026 @ 12:00 pm CT

Bergmann's on Lombard, Suite 620, 167 Lombard Avenue, Winnipeg

Lunch Included

"Just a Simple Gift" ... Or is it? Navigating Traps in Family Gifting

Speaker: Daniel Watts, JD, TEP, Winnipeg: CI Assante

NOVEMBER 2026 BUNDLE SEMINAR – LOCAL EVENT

Tuesday, November 24, 2026 @ 12:00 pm CT

Bergmann's on Lombard, Suite 620, 167 Lombard Avenue, Winnipeg

Lunch Included

Keeping the Peace (and the CRA Happy): Spousal Trusts in Action

Speaker: Desiree Katz, JD, Winnipeg: MLT Aikins

JANUARY 2027 BUNDLE SEMINAR – LOCAL EVENT

Tuesday, January 12, 2027 @ 12:00 pm CT

Bergmann's on Lombard, Suite 620, 167 Lombard Avenue, Winnipeg

Lunch Included

Canadian Tax Update

Speaker: Travis Nesbitt, BComm, CPA, Winnipeg: Doane Grant Thornton LLP

FEBRUARY 2027 SEPARATE FROM BUNDLE

Wednesday, February 10, 2027 @ 8:00 am CT

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

FEBRUARY 2027 BUNDLE SEMINAR - LOCAL EVENT

Tuesday, February 16, 2027 @ 12:00 pm CT

Bergmann's on Lombard, Suite 620, 167 Lombard Avenue, Winnipeg

Lunch Included

Planning for Professionals: Corporate, Tax, and Wealth Transfer Strategies

Speaker: Graham Fuga, MBA, JD, PEng, CPA, CMA, TEP, Winnipeg: Pitblado Law LLP

MARCH 2027 BUNDLE SEMINAR – LOCAL EVENT

Tuesday, March 16, 2027 @ 12:00 pm CT

Bergmann's on Lombard, Suite 620, 167 Lombard Avenue, Winnipeg

Lunch Included

Timing, Tax, and Tough Decisions: Estate Planning for Terminal Illness and MAiD

Speaker: Andrew Torbiak, JD, TEP, Winnipeg: Tradition Law LLP

MAY 2027 BUNDLE SEMINAR – LOCAL EVENT

Tuesday, May 4, 2027 @ 12:00 pm CT

Bergmann's on Lombard, Suite 620, 167 Lombard Avenue, Winnipeg

Lunch Included

Estate Planning and Administration for Indigenous Clients & Annual Branch Meeting

Speaker: Nicole Richmond, JD, Pic River: Nicole Richmond

STEP Winnipeg 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.