



27TH NATIONAL CONFERENCE
STEPCANADA

Grow Your Connections



T O R O N T O
JUNE 16-17
2025





Attended by
**more than 1,000
senior STEP
professionals from
across Canada and
around the world.**

STEP Canada is proud to celebrate its 27th National Conference in 2025.

The 2025 STEP Canada National Conference will feature over 50 top experts sharing insights on the latest trends in estate planning and wealth management.

This year’s program includes two days of practical, timely, and exclusive technical content for practitioners. The conference will be hybrid, with an in-person event on June 16-17 in Toronto and on-demand access to all 19 sessions beginning June 23 for all registrants.

The STEP Canada conference has become a must-attend event for practitioners and sponsors, offering unparalleled opportunities for networking, professional growth, and continuing education.

STEP Canada offers in-person attendees two full days of engaging events and unique experiences, including:



Top speakers from across Canada, the United States, and overseas



A conference app featuring presentations and papers



Breakfasts, lunches and health breaks



A traditional conference binder of materials (upon order)



An eco-friendly, premium conference bag



Lively exhibit hall featuring industry-related and organizations

Sponsorship

Sponsoring organizations will have several opportunities to highlight their business products, strengthen their business relationships, and forge new bonds with senior specialists in the trust and estate field.

Sponsors are invited to choose options listed in the following pages. Each one represents a different level of financial commitment and offers corresponding commercial benefits.

Sponsorships will be allocated on a first come, first-served basis. However, in recognition of their past support, certain sponsors have been offered early renewal of their sponsorship agreements. Some of these sponsorships have already been reserved.

Please note that HST is applicable to all sponsorship fees. All materials used by sponsors at the conference are subject to approval by STEP Canada.



If you have additional ideas, wish to discuss a customized sponsorship package, or would like to reserve an existing opportunity as listed in this package, please contact Janis Armstrong, Director of Business Development, STEP Canada, at jarmstrong@step.ca

EXCLUSIVE SPONSORS Platinum, Technology, Presenting, and Green Levels

Starting Benefits

- Acknowledgement of your sponsorship in the opening remarks, both verbally and on the large screen
- Prominent display of your logo on the front page of the printed and electronic conference program
- Prominent display of your organization's banner on the conference app
- Fifty-word editorial about your organization featured on the registration site and the conference app (supplied by sponsor)
- Video file link beside your logo on the registration site and conference app that can introduce your organization to our delegates or just says hello to them (supplied by sponsor)
- Acknowledgement of your level of sponsorship on STEP Canada's registration website and conference app, with a hyperlink back to your organization's website
- Social media banners/posts to be created by STEP Canada thanking you for your support. STEP Canada will share these on social media; your organization is also encouraged to share
- Exclusive and prominent exhibit area during the conference to display promotional materials
- Preferred advance booth location selection
- Insertion of your reasonably-sized promotional materials in the conference bag
- Access to the pre-registered attendee list (name, organization, and city) one week before the conference

PLUS Exclusive Sponsors will receive the benefits outlined in the Exclusive Sponsorship Package of your choice (see following page).

“The STEP conference is always the best in terms of education content and diversity.”



“

This conference is
THE educational
event of the year.

”

PLATINUM SPONSOR **\$22,000 – RESERVED**

Exclusive starting sponsor benefits as noted, plus:

- Exclusive sponsor of Monday evening's social event
- Opportunity to make a welcome speech to attendees
- Signage around the social event venue acknowledging your sponsorship of the event
- Prominent logo placement on up-market conference bag distributed to all in-person attendees
- Logo on thank-you video that plays each morning
- Insertion of your promotional materials (not exceeding eight (8) printed pages) in the conference bag
- Twenty-five (25) complimentary tickets to the social event

TECHNOLOGY SPONSOR **\$17,000 – RESERVED**

Exclusive starting sponsor benefits as noted, plus:

- Exclusive sponsor of WiFi service throughout the conference venue
- Your logo displayed exclusively on the splash page of the 2024 conference app
- Your logo on the mini-program summary distributed to all attendees
- Logo on thank-you video that plays each morning
- Charging/power station located beside technology sponsor exhibit booth
- Insertion of your promotional materials (not exceeding eight (8) printed pages) in the conference bag
- Fifteen (15) complimentary tickets to the social event
- Logo and technology sponsor sign on each power-up table, located inside the session rooms (on perimeter walls)



“

This conference
was much more
professional,
and everything
flowed smoothly.

”

PRESENTING SPONSOR **\$15,000 – RESERVED**

Exclusive starting sponsor benefits as noted, plus:

- Exclusive sponsor of speaker thank-you gifts presented to speakers at the conclusion of each session
- Verbal acknowledgement of sponsorship by all session moderators
- Opportunity to include a personalized note to speakers with each gift
- Your logo on the mini-program summary distributed to all attendees
- Logo on thank-you video that plays each morning
- Insertion of your promotional materials (not exceeding eight (8) printed pages) in the conference bag
- Ten (10) complimentary tickets to the social event

GREEN SPONSOR **\$12,250 – RESERVED**

Exclusive starting sponsor benefits as noted, plus:

- Exclusive sponsor of large plant and floral display located in main conference foyer
- Plants will be randomly gifted to delegates as they leave Tuesday afternoon (nothing too big to carry, but make beautiful addition to balconies, offices, and gardens)
- Logo stickers on plant pots
- Signage around the plant display acknowledging your sponsorship
- Logo on thank-you video that plays each morning.
- Insertion of your promotional materials (not exceeding four (4) printed pages) in the conference bag.
- Ten (10) complimentary tickets to the social event

The STEP Canada conference has established itself as a must-attend event for domestic and international practitioners and partnering sponsors.

Join us this June for unsurpassed networking, business development, and continuing education opportunities.

STEP Canada continues to deliver unparalleled technical content and networking opportunities.

Conference attendees can select sessions featuring the latest developments in trusts and estates, as well as practical commentary from our panels of experts. Plenary and concurrent sessions will provide practitioners from all disciplines with timely and relevant information that will add value to their practices.

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A large blue circle with a white border is centered on the page. Inside the circle, at the top, is a large white opening quotation mark. Below it, the text "This conference was one of the best I have ever attended. It was well organized, offered fantastic food, and the content of the presentations was top-notch." is written in white. At the bottom of the circle is a large white closing quotation mark. The background of the entire page is a blurred photograph of a conference room with people seated at tables.

“

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”

MAJOR SPONSORS

Gold, Silver, and Bronze Levels

Starting Benefits

- Your logo displayed on the front page of the printed and electronic conference program
- Acknowledgement of your level of sponsorship on STEP Canada's website and conference app, with a hyperlink back to your organization's website
- Fifty-word editorial about your organization featured on the registration site and the conference app (supplied by sponsor)
- Video file link beside your logo on the registration site and the conference app that will introduce your organization to our delegates, or just say hello to them (supplied by sponsor)
- Social media banners/posts will be created by STEP thanking you for your support. STEP Canada will share these on social media, and your organization is encouraged to share as well
- Acknowledgement of your sponsorship during the opening proceedings, both verbally and on the large screen
- Insertion of your reasonably-sized promotional materials in the conference bag
- Access to the pre-registered attendee list (name, organization, and city) one week before the conference

This conference was the best of all attended conferences, especially the ratios of age, and it was great to see a lot of young practitioners!

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PLUS Major Sponsors will receive the benefits outlined in the Major Sponsorship Package of your choice (see following page).



GOLD SPONSOR – \$9,000
EIGHT OPPORTUNITIES
RESERVED

Major starting sponsor benefits as noted, plus:

- Co-sponsorship of both luncheons.
- Signage around luncheon buffets acknowledging your sponsorship of the luncheons
- Prominent logo placement on escalator wraps from concourse level to lower concourse level
- Logo displayed on a center cube of every table at the luncheons
- Logo on thank-you video that plays before first session following both luncheons
- Exclusive exhibit area during the conference to display promotional products
- Insertion of your promotional materials (not exceeding four (4) printed pages) in the conference bag
- Ten (10) complimentary tickets to the social event



SILVER SPONSOR – \$6,500
EIGHTEEN OPPORTUNITIES
RESERVED

Major starting sponsor benefits as noted, plus:

- Co-sponsorship of both continental breakfasts
- Signage around the buffet breakfast area acknowledging your sponsorship
- Logo imprinted (with other breakfast sponsors) on eco-friendly, insulated coffee cups
- Logo on thank-you video that plays before first session following both breakfasts
- Exclusive exhibit area during the conference to display promotional material
- Insertion of your promotional materials (not exceeding four (4) printed pages) in the conference bag

BRONZE SPONSOR – \$2,500
MANY OPPORTUNITIES
AVAILABLE

Major starting sponsor benefits as noted, plus:

- Co-sponsorship of health breaks
- Signage around the refreshment stations acknowledging your sponsorship
- Insertion of your promotional materials (not exceeding two (2) printed pages) in the conference bag





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STEPCANADA

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STEP Canada

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CANADA

Supporting trust and estate practitioners
in their pursuit of excellence