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1-2, 2026 TORONTO HOTEL

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 1-2, 2026
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 TORONTO HOTEL



STEP reserves the right to modify program content and/or speaker lineup as required.
 Version: May 20, 2026

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PRELIMINARY PROGRAM

PRE-REGISTRATION – SUNDAY, MAY 31, 2026

4:00 – 8:30 **Pre-Registration**

Grand Foyer

Delegates are strongly encouraged to visit the registration desk on Sunday evening to collect their registration kit. This will ensure you avoid the lines on Monday morning and have ample time to enjoy a delicious breakfast before your first session.

FULL DAY ONE – MONDAY, JUNE 1, 2026

PLENARY SESSIONS – MONDAY AM

7:45 – 8:30 **Registration, Buffet Breakfast, and Exhibits**

Exhibit Hall

Grand Foyer

Buffet Breakfast Courtesy of Silver Sponsors

- **Cadesky Tax**
- **CIBC Private Wealth Management**
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- **Hodgson Russ LLP**
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- **Legacy Tax + Trust Lawyers**
- **PricewaterhouseCoopers LLP**
- **Solus Trust Company**
- **Stewart McKelvey**
- **WEL Partners**

8:30 – 8:50 **Opening Remarks**

Grand Ballroom

Richard Niedermayer, KC, TEP, Halifax: Stewart McKelvey; STEP Canada Chair

Hélène Gagné, LLB, LLM, MFisc, TEP, Montreal: Osler Hoskin & Harcourt LLP

8:50 – 9:20 **Practitioners' Update: International**

Grand Ballroom

Session 1

Global Mobility for Canadians: Legal and Tax Considerations in Cross-Border Moves

With increasing political uncertainty, evolving tax landscapes, and the proliferation of special tax regimes designed to attract wealthy individuals, the international relocation of Canadians is becoming more common. Advisors must take a holistic approach to successfully guide clients through the complex legal and tax implications of cross-border moves. This session will present an analysis of the critical considerations involved in outbound relocations of Canadians, including:

- Immigration—residency and citizenship pathways
- Taxation—impact of relocation on personal and business taxation
- Succession—estate planning and inheritance rules

	- Family law—implications for marital property, divorce, and children - Practical considerations—health care and education Moderator: Brian Cohen, LLB, TEP, Toronto: Gowling WLG (Canada) LLP; Deputy Chair, STEP Canada Speaker: Nicola Saccardo, LLB, CPA, London, UK & Milan, IT: Charles Russell Speechlys
9:20 – 10:20 Grand Ballroom Session 2	Practitioners' Update: Canadian Tax Law This session will provide an overview of recent changes shaping the Canadian tax landscape. The session will highlight key legislative amendments, noteworthy court decisions, CRA interpretations, and policy updates, along with other developments relevant to practitioners advising on trusts, estates, and private businesses. Moderator: Brian Cohen, LLB, TEP, Toronto: Gowling WLG (Canada) LLP; Deputy Chair, STEP Canada Speakers: Hélène Gagné, LLB, LLM, MFisc, TEP, Montreal: Osler Hoskin & Harcourt LLP Sathees Ratnam, CPA, CA, TEP, Toronto: PwC Canada
10:20 – 10:45 Grand Foyer	Health Break and Exhibits Health Break Courtesy of Bronze Sponsors - Cassels Brock & Blackwell LLP - Continuum - Cooper Estate & Trust Services - Estatesearch - Field Law - Focal - Gordon's Downsizing & Estate Services Ltd Brokerage - Guardian Estate Company - Linmac LLP - Manulife - McCarthy Tétrault LLP - Missingwealth - Nicola Wealth - Norton Rose Fulbright - Stevenson Hood Thornton Beaubier LLP
10:45 – 11:45 Grand Ballroom Session 3	Practitioners' Update: Canadian Trust and Estate Law This session will review leading cases from the past year in both common-law and civil-law jurisdictions. Moderator: Paul Taylor, LLB, TEP, Ottawa: Borden Ladner Gervais LLP; Treasurer, STEP Canada Speakers: William Dion-Bernard, LLB, DDN, TEP, Montreal: Robinson Sheppard Shapiro LLP Melanie Yach, LLB, TEP, Toronto: Aird & Berlis LLP
11:45 – 12:30 Grand Ballroom Session 4	Practitioners' Update: US Tax Law 2026 US Tax and Estate Update: Cross-Border Planning for Canadians and US Citizens in Canada This session will explore the 2026 US tax and legal landscape and its implications for Canadians with US assets, and for US citizens residing in Canada. The session will unpack key developments, including expanded estate and gift tax exemptions under the <i>One Big Beautiful Bill Act</i> and the implications for cross-border estate and trust planning. The discussion will highlight planning strategies to mitigate cross-border tax exposure, navigate trust structures, and ensure compliance with evolving US reporting rules. Moderator: Paul Taylor, LLB, TEP, Ottawa: Borden Ladner Gervais LLP; Treasurer, STEP Canada Speaker: Britta McKenna, JD, Buffalo, NY: Hodgson Russ

LUNCHEON	
12:30 – 1:45 Sheraton Hall	Networking Luncheon Luncheon Courtesy of Gold Sponsors • Aird & Berlis LLP • Fasken LLP • Gowling WLG (Canada) LLP • IG Private Wealth Management • KPMG LLP • Miller Thomson LLP • O'Sullivan Estate Lawyers • TD Wealth Private Trust
CONCURRENT SESSIONS: GROUP 1 – MONDAY PM	
1:45 – 3:15 Grand Centre + West Session 5	Innovative Uses of Trusts for Complex Client Needs Trusts are among the most versatile tools in wealth and estate planning, yet their potential reaches far beyond conventional uses. This session will highlight specialized trust structures that address unique client objectives, regulatory requirements, and innovative planning opportunities, including: • Life interest trusts—for achieving tax efficiency, asset protection, privacy, and streamlined administration • Purpose-driven trusts—qualified environmental trusts and public good and charitable remainder trusts for aligning private wealth planning and public welfare with sustainability and philanthropy • Personalized solutions—pet trusts, Henson-type trusts, and copyright trusts for safeguarding loved ones, vulnerable beneficiaries, and intellectual property • Commercial and civic applications—cemetery, municipal, and commercial trusts for heritage preservation and flexible business arrangements Through practical examples and actionable strategies, this session will demonstrate how specialized trusts can solve non-traditional planning needs while ensuring compliance and fiduciary integrity. Moderator/ Speaker: Richard Weiland, LLB, TEP, Vancouver: Clark Wilson LLP Speakers: André Barette, LLL, TEP, Montreal: Trust Eterna Kirk O'Brien, MBA, CPA, CMA, CFP, FEA, TEP, Victoria: BMO Private Wealth
1:45 – 3:15 Osgoode East Session 6	Life Insurance Planning: The Intricacies You Need to Know This session will review the fundamentals of how life insurance products function and investigate more advanced strategies from a tax and estate planning perspective. The session will explore and discuss the advantages and disadvantages of the following: • Integrating corporate-owned life insurance with post mortem planning, including best practices and optimization • Immediate leveraged life insurance • Life insurance tracking shares • Shared ownership/split-dollar life insurance strategies • Using life insurance to support philanthropic goals Moderator/ Speaker: Hemal Balsara, CPA, CA, CFP, FEA, TEP, Toronto: Manulife Financial Speakers: Angela Lang, CPA, CGA, Vancouver: Promerita Group Florence Marino, LLB, TEP, Toronto: Tompkins Insurance Services Ltd.
1:45 – 3:15 Grand East + East Large Session 7	Defusing the Hidden Tax Land Mines in International Estates Administering an international estate can feel like playing Minesweeper—one misstep can trigger costly tax consequences. This session will equip TEPs with practical strategies to identify and manage the less obvious cross-border tax risks that arise during estate administration, including: • Estate tax residency—understand how different jurisdictions determine the tax residency of an estate and the risks of dual residency, and ensure global compliance • Non-resident trustee pitfalls—explore how non-resident trustees can inadvertently affect CCPC status

	• Distributions to non-resident beneficiaries—address rollover eligibility, capital dividend account issues, and withholding tax obligations • Section 116 compliance—manage taxable Canadian property (TCP) that is held or distributed by the estate, and navigate clearance certificate requirements • Ongoing Canadian tax obligations—clarify when non-resident estates must continue filing in Canada, especially when the deceased was a Canadian resident or TCP is involved • Deemed resident trust rules—apply Canadian deemed residency rules to testamentary trusts and understand their long-term tax implications • Foreign tax credit challenges—identify limitations in claiming foreign tax credits, especially when dealing with inheritance and estate taxes • Inbound transfers from foreign estates—learn how Canadian-resident beneficiaries are taxed on property received from non-resident estates, including rollover eligibility and income attribution Moderator/ Speaker: Corina Weigl, LLB, TEP, Toronto: Fasken LLP; Secretary, STEP Canada Speakers: Grace Chow, FCPA, FCA, FCCA (UK), FTIHK, CTA, TEP, Toronto: Cadesky Tax Elie Roth, LLB, LLM (Tax), TEP, Toronto: Davies Ward Phillips & Vineberg LLP
3:15 – 3:40 Grand Foyer	Health Break and Exhibits Health Break Courtesy of Bronze Sponsors • Cassels Brock & Blackwell LLP • Continuum • Cooper Estate & Trust Services • Estatesearch • Field Law • Focal • Gordon's Downsizing & Estate Services Ltd Brokerage • Guardian Estate Company • Linmac LLP • Manulife • McCarthy Tétrault LLP • Missingwealth • Nicola Wealth • Norton Rose Fulbright • Stevenson Hood Thornton Beaubier LLP
CONCURRENT SESSIONS: GROUP 2 – MONDAY PM	
3:40 – 4:55 Grand Centre + West Session 8	Substantial Compliance: When Is a Non-Compliant Document Still a Valid Will? In an era of evolving testamentary practices and increasing informality in how individuals express their final wishes, the doctrine of substantial compliance has become a critical area of focus for practitioners. This session will explore the legal thresholds and practical implications of recognizing documents that fail to meet formal statutory requirements but may still be upheld as valid wills. Questions to be addressed include: • How do judicial tests for substantial compliance—including limits on substantial compliance—vary from province to province? • What factors do the courts consider in assessing whether a document reflects the deceased's final testamentary intentions? • Can digital files or messages and informal notes be recognized as valid wills? • What investigative obligations do executors or administrators have in identifying and interpreting informal potential testamentary documents? • How do revocation rules apply to documents that may be deemed substantially compliant? • What happens when estate administration involves multiple jurisdictions with differing standards, such as those for the recognition of holograph wills, or civil-law approaches to will validity? • What litigation risks and professional liability concerns arise when advising clients on non-compliant documents? This session will challenge attendees to consider how far the boundaries of testamentary formality can stretch, and what that means for their clients and their practice. Moderator/ Speaker: Tanya Butler, LLB, TEP, Dartmouth: Touchstone Legal Inc. Speakers: Antonio Iacovelli, BCL/LLB, TEP, Montreal: Miller Thomson LLP Ingrid Tsui, LLB, TEP, Vancouver: Alexander Holburn Beaudin + Lang LLP

3:40 – 4:55 Grand East + East Large Session 9	Valuation Triggers: Navigating Events, Experts, and Expectations This session will provide a practical overview of valuations: when they are required, which type is appropriate, and who is qualified to provide them. The session will highlight key differences between valuations and appraisals, touch on current methodologies, and explore common scenarios such as estate freezes, business sales, intergenerational transfers, marital breakdowns, trust interests, and charitable share donations. It will also cover factors that can shift a valuation, when updates are needed, and what to expect from CRA review and information requests. Moderator: Michelle D. Coleman, CPA, CA, CEA, TEP, Edmonton: MNP LLP; Director at Large, STEP Canada Speakers: Ian Hull, LLB, LSM, CS, TEP, Toronto: Hull & Hull LLP Jim Muccilli, MBA, CPA, CA, CBV, CFE, ASA, CFF, CEIV, ABV, Toronto: Crowe Soberman LLP
3:40 – 4:55 Osgoode East Session 10	Surf & Turf: Farming/Fishing Clients' Tax and Succession Planning, Tips, and Traps Canada's largest intergenerational wealth transfer is under way, and many transitions involve farming and fishing enterprises with assets rich in both value and legacy. This session will cover the following topics: • Farming/Fishing Taxation 101—key rules for transitioning enterprises, including the lifetime capital gains exemption • Planning traps—case studies on pitfalls such as restricted farm losses, residency issues, broken lineal chains, transfers to stepchildren, and issues relating to the “home quarter” • Transfers on death—tax and estate administration challenges when plans are absent or poorly executed • Collaboration matters—how advisors can work together for the client's best outcome Even urban practitioners will benefit from this session: your clients may inherit farming or fishing property! Moderator: Kenneth Keung, CA, CPA (CO), CFP, MTAX, LLB, TEP, Victoria: Doane Grant Thornton LLP Speakers: Benjamin Carver, BCL/LLB, TEP, Bridgewater: Carver Estate Law & Litigation Crystal Taylor, KC, TEP, Saskatoon: Felesky Flynn LLP
COCKTAIL PARTY	
5:30 – 7:30 Arcadian Court 8th Floor 401 Bay Street 4-minute walk from the Sheraton Centre Hotel.	MONDAY NIGHT COCKTAIL PARTY Step into one of Toronto's most iconic venues and elevate your conference experience with an evening full of connection and celebration. The beautifully restored Arcadian Court sets the stage for a vibrant social gathering where STEP Canada members and guests can relax, reconnect, and recharge. • Mingle freely with peers from across Canada in a sophisticated yet relaxed setting • Indulge in curated hors d'oeuvres and premium drink stations throughout the space • Unwind before heading to your own dinner plans elsewhere in the city Whether you're catching up with long-time colleagues or making new connections, this night promises memorable moments. Tickets are not included in the price of in-person conference registration and must be purchased separately at the time of conference registration. Capacity for this popular event is limited, and delegates are encouraged to secure tickets during registration to avoid disappointment. Social Event Courtesy of Platinum Sponsor • RBC Wealth Management, Royal Trust

FULL DAY TWO – TUESDAY, JUNE 2, 2026	
7:45 – 8:30 Exhibit Hall Grand Foyer	Registration, Buffet Breakfast, and Exhibits Buffet Breakfast Courtesy of Silver Sponsors • BMO Trust Company • Concentra Trust EQ Bank Equitable Bank • Estate Research • Fogler Rubinoff LLP • Legacy Private Trust • MNP LLP • PPI • Thorsteinssons LLP • Tompkins Insurance Services Ltd. • WeirFoulds
PLENARY SESSIONS – TUESDAY AM	
8:30 – 9:00 Grand Ballroom	Opening Remarks, Awards & STEP Worldwide Welcome Remarks Brian Cohen , LLB, TEP, Toronto: Gowling WLG (Canada) LLP; Deputy Chair, STEP Canada Pamela Cross , LLB, ICD.D, TEP, Ottawa: Borden Ladner Gervais LLP; Canadian Representative, STEP Council; STEP Worldwide Board Member Rodney Luker , LLB, TEP, Adelaide, Aus: Hume Taylor Lawyers; STEP Worldwide Board Member
9:00 – 9:30 Grand Ballroom Session 11	Intelligent Counsel: Harnessing AI for the Future of Estate and Tax Practice As artificial intelligence transforms professional services worldwide, estate and tax practitioners face both unprecedented opportunities and risk management challenges. To address the evolving role of AI in advisory work, compliance, and client service, this session will cover practical applications that are transforming estate and tax practice, including document automation and drafting tools, audit risk assessment tools, technical tax analysis databases, and large language models. The session will also dig deeper into issues raised by the use of AI in professional services, including ethics, data privacy, and regulatory frameworks. Attendees will gain actionable insights into how to responsibly incorporate AI applications into their practice while maintaining professional integrity. Moderator: Rhonda Johnson , MBA, KC, TEP, Edmonton: Field Law LLP Speakers: Dave Madan , MBA, CFP, CIM, PFP, FCSI, TEP, Edmonton: Scotia Wealth Management, Scotiastrust Junaid Mirza , BBA, MSc, CPA (DE), Toronto: PwC Canada
9:30 – 10:15 Grand Ballroom Session 12	KEYNOTE ADDRESS Thomas Curran, London School of Economics Overcoming the Perfection Trap: Embracing Imperfection to Increase Productivity, Creativity, and Career Achievement Thomas Curran is a professor in the Department of Psychology and Behavioural Science at the London School of Economics and the author of <i>The Perfection Trap: Embracing the Power of Good Enough</i> . This plenary will focus on the unique challenges faced by trust and estate practitioners, and why perfectionism has been such an appealing (but ultimately unsustainable) solution. Professor Curran will highlight what the science tells us regarding high-achieving individuals and the institutional costs of perfectionism, and what realistic alternatives exist for more sustainable approaches to productivity and job satisfaction. Moderator: Rhonda Johnson , MBA, KC, TEP, Edmonton: Field Law LLP Speaker: Thomas Curran , PhD, London, UK: London School of Economics

10:15 – 10:40 Grand Foyer	Health Break and Exhibits Health Break Courtesy of Bronze Sponsors • Cassels Brock & Blackwell LLP • Continuum • Cooper Estate & Trust Services • Estatesearch • Field Law • Focal • Gordon's Downsizing & Estate Services Ltd Brokerage • Guardian Estate Company • Linmac LLP • Manulife • McCarthy Tétrault LLP • Missingwealth • Nicola Wealth • Norton Rose Fulbright • Stevenson Hood Thornton Beaubier LLP
CONCURRENT SESSIONS: GROUP 3 – TUESDAY AM	
10:40 – 12:10 Grand Centre + West Session 13	Indefeasible Vesting: The What, the How, and the Why (or Why Not) Indefeasible vesting, though not defined in the <i>Income Tax Act</i>, has a significant impact in the context of death and can be used as a trust administration planning technique to address the 21-year deemed disposition rule. This session will explain the common law around indefeasible vesting, how to implement it, and the advantages and disadvantages of such planning in the income tax context. The session will also address indefeasible vesting under Quebec civil law. Moderator/ Speaker: Troy McEachren, BCL/LLB, TEP, Montreal: McCarthy Tétrault LLP Speakers: Catherine Brown, BA, JD, LL.M, PhD, Calgary: Professor, Faculty of Law, University of Calgary Alison Oxtoby, LLB, TEP, Vancouver: Fasken LLP
10:40 – 12:10 Grand East + East Large Session 14	Life After Death: What Happens to Your Registered Accounts? Most clients hold at least one registered account of some kind, such as a registered retirement savings plan, registered retirement income fund, first home savings account, registered education savings plan, tax-free savings account, or registered disability savings plan. This session will explore the many intricacies of how registered accounts are dealt with when a client dies, either with or without a named beneficiary. The session will also discuss planning tips, including tax-deferred rollovers, the elections may be required, and how to elect out of a rollover. Moderator/ Speaker: Sébastien Desmarais, LLB, JD (US), LLL, TEP, Ottawa: TD Wealth Speakers: Katy Basi, MBA, LLB, TEP, Richmond Hill: Basi Law Professional Corporation Sara Kinnear, LLB, CFP, TEP, Winnipeg: IG Wealth Management
10:40 – 12:10 Osgoode East Session 15	Estate Planning Across the Atlantic: Canada, the United Kingdom, and France International estates are a reality that advisors can no longer ignore. As global mobility increases, the “simple” estate is becoming a relic of the past. When a person’s life spans Canada, the United Kingdom, and/or France, advisors face a collision of legal systems. This session will focus on the cross-border estate and tax planning issues that arise when a person dies with assets in or with ties of nationality, residence, or domicile to Canada, the United Kingdom, and France. Topics of discussion will include recent amendments to the UK tax law and UK inheritance tax, as well as France’s succession laws (notably, the concept of forced heirship), the incidence of French inheritance tax, the impact of the European Succession Regulation, and the use of usufruct as an estate-planning tool. The session will also review relevant tax treaty provisions and consider the availability of tax relief for charitable donations and with respect to an inheritance by a surviving spouse. Moderator: Amanda Doucette, LLB, LL.M, TEP, Saskatoon: Stevenson Hood Thornton Beaubier LLP; Director at Large, STEP Canada Speakers: Ouri Belmin, Paris, FR: Tirard Naudin A.A.R.P.I. Claire Weeks, TEP, London, UK: Maurice Turnor Gardner

LUNCHEON	
12:10 – 1:25 Sheraton Hall	Networking Luncheon Luncheon Courtesy of Gold Sponsors • TD Wealth Private Trust • O'Sullivan Estate Lawyers • Miller Thomson LLP • KPMG LLP • IG Private Wealth Management • Gowling WLG (Canada) LLP • Fasken LLP • Aird & Berlis LLP
CONCURRENT SESSIONS: GROUP 4 – TUESDAY PM	
1:25 – 2:40 Grand East + East Large Session 16	At the Margins: Navigating the Grey Zone Between Capacity and Incapacity Adults who are living independently but who are suffering from diminished or diminishing capacity inhabit a grey zone that might be called “marginal capacity.” In their personal lives, they might mismanage their assets or neglect their health needs, and may be susceptible to financial and emotional abuse, while in their professional lives, they may be serving as corporate directors or officers of family businesses and trustees of family trusts. This session will focus on the legal and practical remedies available to supportive family members, friends, colleagues, and advisors of adults with marginal capacity. Questions to be addressed include: • What provisions in a corporation’s constating documents can assist in removing the person from a corporate role? • What remedies exist to remove the person as a trustee? • What remedies exist to prevent the person from making an improvident transfer of real property? • How and when can the person be removed as an executor or estate trustee? • What remedies exist to help if the person is being unduly influenced or financially abused by a child or caregiver? • What planning can be done to help avoid these types of situations, and what evidence is needed to pursue a remedy? • For advisors grappling with professional responsibility and ethical issues, who is your client? Moderator/ Speaker: Kathleen McDormand, LLB, TEP, Ottawa: Borden Ladner Gervais LLP Speakers: Eric Hoffstein, LLB, TEP, Toronto: Fogler Rubinoff LLP; Chair, STEP Toronto Anaïs Kadian, BCL/LLB, Montreal: Robinson Sheppard Shapiro LLP
1:25 – 2:40 Osgoode East Session 17	High Net Worth Audits: New CRA Audit Powers and Recent Experience In recent years, the CRA has devoted considerable resources to auditing high net worth individuals and their network of corporations, trusts, partnerships, and other entities. In doing so, the CRA has relied upon certain “enhanced” audit powers and new, additional powers that could pose significant challenges to taxpayers and their advisors. This session will address these new or enhanced audit powers, with a particular focus on the use of these powers in audits of high net worth individuals and their related entities. Topics to be addressed include: • Sources of information available to the CRA (tax returns, foreign reporting forms, offshore tax informant program, FINTRAC reports, reportable and notifiable transaction reporting, etc.) • The CRA’s current approach to information gathering and exercise of its existing audit tools • Proposed legislation that would further bolster the audit powers available to the CRA, and the inevitable difficulties and practical consequences flowing therefrom • Impacts on advisors (lawyers, accountants, financial advisors, etc.), either as direct targets of an audit request or as indirect guides to managing or assisting with the audit process, and privilege considerations • Defences to CRA audit demands and judicial responses to date • Tips for successfully navigating a high net worth audit (in dealing with both the CRA and clients) Moderator/ Speaker: Alexander Demner, JD, TEP, Vancouver: Thorsteinssons LLP

	Speakers: Mark Brender , BCL/LLB, TEP, Montreal: Osler Hoskin & Harcourt LLP Robert Carvalho , LLB, Vancouver: Thorsteinssons LLP
1:25 – 2:40 Grand Centre + West Session 18	Families Split by the 49th Parallel: What to Know When Children Move to the United States When children move to the United States, Canadian families can face unexpected cross-border tax, estate, and reporting complications—from departure tax and the treatment of RRSPs and TFSAs to US estate and gift tax exposure, trust restructuring, and the need for coordinated wills, powers of attorney, and compliance with FBAR, FATCA, and Canadian non-resident reporting rules. This session will distill the key risks and planning opportunities that families need to consider in order to cross the 49th parallel with confidence. Moderator: Mariska Loeppky, CPA, CA, CFP, TEP, Winnipeg: IG Wealth Management Speakers: Dean Smith, PhD, CFP, CPA, CA, RWM, TEP, Toronto: Cadesky Tax Samantha Wu, JD, TEP, Toronto: Cassels Brock & Blackwell LLP
2:40 – 3:05 Grand Foyer	Health Break and Exhibits Health Break Courtesy of Bronze Sponsors • Cassels Brock & Blackwell LLP • Continuum • Cooper Estate & Trust Services • Estatesearch • Field Law • Focal • Gordon's Downsizing & Estate Services Ltd Brokerage • Guardian Estate Company • Linmac LLP • Manulife • McCarthy Tétrault LLP • Missingwealth • Nicola Wealth • Norton Rose Fulbright • Stevenson Hood Thornton Beaubier LLP
PLENARY SESSION – TUESDAY PM	
3:05 – 4:35 Grand Ballroom Session 19	STEP Canada/CRA Roundtable Senior representatives from the Canada Revenue Agency (CRA) will answer questions prepared by trust and estate practitioners about cases and issues of concern to practitioners and their clients. Moderator: Pamela Cross, LLB, ICD.D, TEP, Ottawa: Borden Ladner Gervais LLP; Canadian Representative, STEP Council; STEP Worldwide Board Member Speakers: Michael Cadesky, FCPA, FCA, FTIHK, CTA, TEP (Emeritus), Toronto: Cadesky Tax Angela Ross, LLB, TEP, Toronto: PwC Canada Katie Campbell, CPA, CA, Ottawa: Acting Manager, Trust Section II, Financial Industries and Trusts Division, Income Tax Rulings Directorate Steve Fron, CPA, CA, TEP, Oshawa: Industry Sector Specialist, Trust Section II, Financial Industries and Trusts Division, Income Tax Rulings Directorate
4:35 Grand Ballroom	Closing Remarks & Adjourn We hope you enjoyed the conference! We'd love to hear your thoughts - please take a moment to complete our surveys and share your feedback.

ONLINE ON-DEMAND CONFERENCE SESSIONS – MONDAY, JUNE 8, 2026

Starting 12:00 pm ET

28th National Conference App

Online viewing on the days of in-person conference will not be available.

Starting Monday, June 8, all paid online AND in-person delegates will have access to the on-demand replays. Once the archived sessions are available on the conference app, a reminder email will be sent. Access to the app and all recordings will be available until December 31, 2026, at 11:59 pm ET. If you have any questions or concerns, please contact memberservices@step.ca

2026 NATIONAL CONFERENCE PROGRAM COMMITTEE

STEP Canada extends its sincere thanks to the members of the Program Committee for their time, insight, and continued commitment in creating this year's conference program content. Their collaborative efforts have been instrumental in shaping this year's conference, ensuring a program that reflects the high standards and shared expertise of the STEP community. Their dedication plays a vital role in delivering an experience that is both professionally enriching and aligned with the values of our profession.

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29th STEP CANADA NATIONAL CONFERENCE
Monday, June 7 – Tuesday, June 8, 2027

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30th STEP CANADA NATIONAL CONFERENCE
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