

STEP CANADA PROUDLY PRESENTS ITS 2024-25 BOARD OF DIRECTORS

The Society of Trust and Estate Practitioners (STEP) is committed to raising the public profile of professionals working in the trust and estate field. STEP members must meet rigorous educational standards and engage in continuing professional development to hold the trust and estate practitioner (TEP) designation. Our members assist families and individuals with estate and succession planning while protecting the interests of their spouses, partners, children, and elderly or vulnerable relatives.

As part of STEP's global community, **STEP Canada** is dedicated to the field of trust and estates with a distinctive Canadian perspective. We uphold STEP's professional standards, focusing on supporting the future of the profession in Canada. Our national board and committees take a leading role in communicating the views of Canadian members to governments, tax authorities, regulators, and the public at large.



Rachel Blumenfeld
LLB, TEP

National Chair, Aird & Berlis LLP, Toronto



Richard Niedermayer
KC, TEP

National Deputy Chair, Stewart McKelvey, Halifax



Brian Cohen
LLB, TEP

National Deputy Chair, Gowling WLG (Canada) LLP, Toronto



Aileen Battye
LLB, TEP

National Treasurer, RBC Family Office Services, Vancouver



Corina Weigl
LLB, TEP

National Secretary, Fasken LLP, Toronto



Chris Ireland
CPA, CA, TEP

National Past Chair, PPI Advisory, Vancouver



Kenneth Keung
CPA, CA, CPA(CO), CFP, MTAX, LLB, TEP

Director at Large, Moodys Private Client, Calgary



Ruth Spetz
KC, TEP, ICD.D, FEA

Director at Large, Borden Ladner Gervais LLP, Calgary



Paul Taylor
LLB, TEP

Director at Large, Borden Ladner Gervais LLP, Ottawa



Michelle D. Coleman
CPA, CA, TEP, CEA

Edmonton Branch Chair, MNP LLP



Samantha Lauzon
TEP

Ottawa Branch Chair, TD Wealth



Shlomi Steve Levy
BA, LLB, JD, TEP

Montreal Branch Chair, Levy Salis LLP



Ian Lebane
LLB, LLM, TEP

Toronto Branch Chair, TD Wealth



Mariska Loeppky
CPA, CA, CFP, TEP

Winnipeg Branch Chair, IG Private Wealth Management



Jessica Lyle
LLB, TEP

Atlantic Branch Chair, Touchstone Legal Inc.



Carol Sadler
CPA, CA, CPA(IL), TEP

Calgary Branch Chair, Achen Henderson LLP



Laura West
JD, TEP

Vancouver Branch Chair, Norton Rose Fulbright Canada LLP