



With access to the monthly *STEP Insider*, readers receive the latest news about STEP Canada, branch and chapter activity, national event updates, recent practitioner opportunities, education information, and more!

Connect with Us on LinkedIn

CONTENTS:

- STEP Private Client Awards**
- 2022-23 Membership Renewal**
- 24th National Conference**
- STEP Global Congress**
- Searchable Resource Tool**
- Family Enterprise Foundation**
- STEP Inside**
- Past Event CE/CPD Credits**
- Practitioner Opportunities**
- Education Centre**
- Branch & Chapter Events**
- Reminders**

STEP Private Client Awards

Calling all Canadians! There are only a few days left to submit your entry for the 17th Annual STEP Private Client Awards (PCAs)!

Showcase yourself, your team, and/or your firm by entering any of the 19 available categories at this year's PCAs. Increase representation for your industry and don't miss the opportunity to showcase yourself on STEP's international stage!

Entries for the 17th Annual PCAs run until April 14th, 2022. This year there are two new awards: Digital Assets Practice of the Year and Employer of the Year.

Open to both STEP members and non-members, these prestigious awards are your opportunity to shine a spotlight on your achievements over the past year and raise the profile of your team, firm, and jurisdiction.

[More details](#)

[View past winners](#)

2022-23 Membership Renewals

It's time to renew your STEP Canada membership!

If you have not yet renewed your annual membership, this is a friendly reminder to submit payment at your earliest convenience. All STEP Canada membership renewals were due by **April 1, 2022**.

Renewing your membership with STEP Canada will allow your continued use of the TEP designation (if applicable) and grants multiple membership benefits such as discounts on programs/seminars, access to member-only publications and resources, use of the SRT, representation from STEP, and much more.

STEP Canada is pleased to offer its members in good standing preferred registration rates to the 24th National Conference, June 15th-17th, 2022. Be sure you renew your membership prior to registering to be eligible for the discounted rates.

[Click here to sign in](#)

24th National Conference

Join us from June 15th-17th for a lineup of outstanding sessions featuring over 40 respected experts who will deliver the highly regarded technical content this conference is known for! This year's conference will once again follow a virtual model, having all sessions pre-recorded, professionally edited, and broadcasted through the STEP Canada 24th National Conference App.

New this year we are kicking off with the highly anticipated 2022 CRA/STEP Canada Round Table on June 15th. Delegates will have the option to view this session online or in-person at a remote location in their region (reservations required).

[Details and Registration](#)

Searchable Resource Tool (SRT)

Have you checked out STEP Canada's **new** Searchable Resource Tool?

As a member, you now have access to a library of STEP Canada content including a collection of presentation decks, formal papers, additional resources, and articles from Branch & Chapter Events, National Conferences and Webcasts, and the STEP Inside newsletter.

Our team is continually adding content to the SRT, and members can view the Chronological List of Contents (CLC) to see a full list of what is included.

Access the STEP Canada SRT today by logging in to your MY STEP account.



STEP Global Congress 2022

Join STEP in London on July 7th-8th, 2022!

Be there when STEP identifies future trends and helps shape our response to the challenges and opportunities they present. Save on registration with an early bird rate if you register by April 29, 2022.

Details and Registration

Family Enterprise Foundation

Family Enterprise Foundation (FEF) is the charitable arm of Family Enterprise Canada.

Ready or not, transitions within Canada's family businesses are coming soon! FEF is excited to share the results of our latest research on the transition intentions of Canadian business families in **Who are the Guardians of Family Legacy?** with members of STEP Canada. With insights and advice from these families and their advisors, this report will be a useful tool when supporting families who are (or should be) having these difficult conversations.

The research identified a generational shift that challenges the notion that the next generation is not ready, willing or interested in taking over the family business. In fact, 97 per cent of next gen respondents (18-35 year-olds) consider it important to sustain the family business. This is good news, as the next generation clearly have a passion to preserve the "familiness" of the business.

To get a sense of the attitudes and perspectives of Canadian business families around transition and to learn more about what you can do to help your clients along this complex journey, please **read the report and listen to the podcast** (available in English and French).

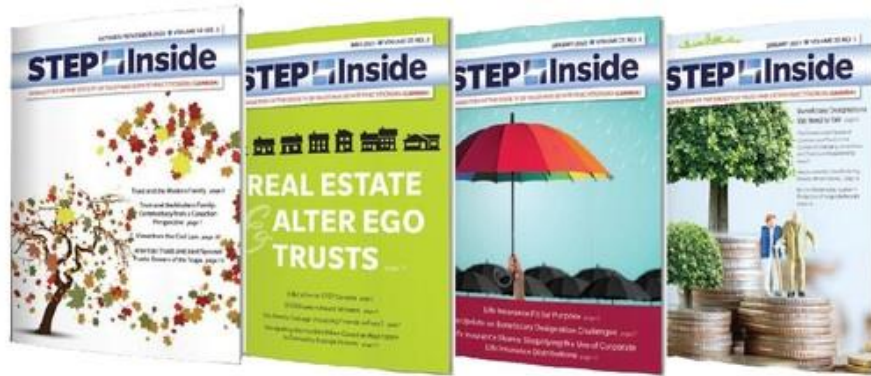
STEP Inside

STEP Inside is the official publication of STEP Canada.

Published each year in January, May, and October, this publication contains industry news and articles, case studies, as well as regulatory and taxation updates.

As a benefit of membership, all members are entitled to receive a hard copy of this valuable resource, in addition to the electronic version that is emailed. Members can also view previous editions under the Resources section of their MY STEP account.

Review your subscription preferences in your membership profile when you renew your STEP membership!



CE/CPD Credits for Past Events

The Member Services team sends supplementary CE/CPD credit certificates monthly for the 2021 Q1 & Q2 Branch Bundle and the 23rd National Conference.

If you have not yet viewed the seminars or completed the quizzes for either event, the archived broadcasts remain available on the app for your viewing. Please contact **Member Services** if you have questions about your CE/CPD credit certificates.

CPD certificates have been sent for the 2021-22 Branch/Chapter Bundle seminars viewed up until December 10th, 2021. If you did not receive your certificate and/or you have concerns regarding your credits, please email memberservices@step.ca. Another CPD certificate will be sent in July 2022 for all remaining Bundle seminars and National Conference sessions.

Access to all apps including the 2020 Speakers' Series, 2021 Q1 & Q2 Branch Bundles, 2021 National Conference, and 2021-22 Branch Bundles will only be available until December 31, 2022.

Practitioner Opportunities

Advertising with STEP Canada's Practitioner Opportunities service offers a highly cost-effective, quick, and simple way to attract the right candidates in this industry. STEP Canada is proud to offer a Practitioner Opportunity service as a great resource for connecting the highest caliber of trust and estate practitioners to employers.

Senior Trust and Estate Consultant, Trust Services - CIBC (Halifax, NS)

Trust Officer - Scotiabank (Calgary, AB)

Director, Wealth Strategy and Services, International Wealth Management - Scotiabank (Toronto, ON)

Estate and Trust Advisor - MD Financial Management (London, ON)

Have questions?

More on Practitioner Opportunities

or

Post an Opportunity

Education Centre

Exam Sittings & Essay Submission Dates

Education Program	Exam/Essay Dates	Registration Deadlines
CETA 1	Accessible at any time	Exams must be completed within 6 months of registration
CETA 2-4	June 1, 2022 September 1, 2022	May 1, 2022 August 1, 2022
STEP Canada Diploma Program	May 30, 2022 November 7, 2022	<i>Registration Closed</i> September 7, 2022
Essay Submission	May 1, 2022 October 1, 2022	*2022 topics can be found here

Updates

STEP Canada is pleased to announce the launch of our new mentorship program!

With the addition of new learning resources and networking opportunities built into our diploma program, we have re-evaluated our mentorship program to ensure that STEP continues to offer a valuable experience to our members.

Our new mentorship program is focused on **career enhancement** and will aim to facilitate a relationship where knowledge and experience are shared between mentors and mentees that work in the same industry.

If you would like more information about becoming a mentor or a mentee, please email education@step.ca.

Diploma Program

Live-virtual instructor tutorials are being held between April 11 – May 16th. Please check your course website for details.

An exam-administration webinar will be scheduled in late April (date TBD) to review the updated exam experience. Please keep an eye out for announcements.

Any questions can be sent to our Education team at education@step.ca.

Note: Please remember that our diploma course registration deadlines have changed to 60 days before the exam.

Upcoming Branch & Chapter Events

**Save the date - registration opening soon*

Wed April 13	STEP Edmonton Student Networking Event 12:00 noon - 1:00 pm MT Zoom	Wed April 13	STEP Winnipeg TEP Talk 12:00 noon - 1:00 pm CT Zoom
Mon May 2	STEP Toronto STEPping out to Lunch 11:45 am - 1:00 pm ET Zoom	Wed May 4	STEP Southwestern Ontario TEP Talk 12:00 noon - 1:00 pm ET Zoom

[Click here to view the entire upcoming schedule for the 2021-2022 Branch/Chapter Bundle.](#)

Reminders

All **STEP Canada staff** are working from home until further notice. Members are encouraged to communicate with us using email. Not sure who to write to? Send any inquiry to memberservices@step.ca and our team will forward your message to the right staff member.

We would like to extend a **big thank you** for our students, TEPs, and supporting employers who see the enormous value in STEP education and membership.

[Quick Links](#)

Advising Families
STEP Member Directory

RETURN TO TOP

Got Questions? Please Contact Us | Phone: 416-491-4949 ext.221 | Toll-free: 1-877-991-4949 | step.ca

[Click to view this email in a browser](#)

If you no longer wish to receive ANY emails from STEP Canada, please reply to this message with "Unsubscribe" in the subject line or simply click on the following link: [Unsubscribe](#)

[Click here to forward this email to a friend](#)

STEP Canada
45 Sheppard Avenue East
Suite 510
Toronto, Ontario M2N 5W9
CA