

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!

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24th Annual National Conference



Exciting news coming soon!

STEP Canada's 24th Annual National Conference will take place during the week of June 13th! We are carefully monitoring public health directives and information to inform a final announcement on our format shortly.

Behind the scenes, our National Conference Program Committee is hard at work putting together an exciting, timely, and accessible format and schedule that will entice all members and non-members. This year's program will once again feature a fantastic lineup of invaluable, practical, and timely technical material for practitioners in our industry, networking opportunities for all delegates, and the highly anticipated STEP Canada - CRA Round Table session.

We look forward to announcing more details with you shortly.

Stay connected, stay informed. Watch your email, the official program, format(s), and registration will launch mid-February.

2021-22 Branch/Chapter Bundles

Did you miss our January national seminar, "Succession Law and the Indigenous Peoples of Canada"? If so, don't worry - it's now available on-demand. Watch, rewatch, or register now to take advantage of this and all other sessions included in this year's programming season.

See what our viewers had to say:

"This topic is so rarely discussed, it was fantastic to hear about it from different specialists working in this field across Canada. It is clear that this type of practice needs to be adapted to each specific indigenous nation and that the knowledge needs to be updated from time to time."

"Outstanding seminar on both an interesting and timely topic. Thank you to all the speakers for sharing their vast wealth of knowledge on the issues."

This seminar is available with your purchase of your local Branch or Chapter Bundle, which includes six timely and topical online seminars. All Bundles offer both live and/or on-demand viewing options, access to presentations and papers, continuing education (CPD) opportunities, live Q&A sessions with the speakers, and interactive delegate networking.

Details and Registration

Equality, Diversity and Inclusion



STEP has published its equality, diversity and inclusivity (EDI) guiding principles, providing a clear EDI framework for everyone acting for and on behalf of STEP. These principles go to the heart of STEP's values of community, collaboration, integrity and continuous learning.

To learn more, please read STEP's announcement [here](#).

17th Annual Private Client Awards

Entries for the 17th Annual STEP Private Client Awards (PCAs) are now open and will 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.

[Details here](#)

Read Our Latest Publications



Members can access recent STEP Canada content such as eNews articles, branch newsletters, guides, and more by logging into their My STEP account at www.step.ca.

Is Your Mailing Address Up to Date?

Are you working from home, or recently changed firms? It's important to update your contact information with STEP Canada to ensure we can always reach you with important updates regarding your membership.

Coming Soon

To ensure you receive your membership renewal package coming March 1st, please login to your My STEP profile [here](#) to review your contact details. You can also email your preferred mailing address to memberservices@step.ca.

Did You Know?

All members (unless requested otherwise) are included in the STEP Directory, and your profile displays the contact information we have for you on file. Ensure that the public and fellow STEP members can reach you by keeping your profile up to date. If you would like to access additional features on your Directory profile, please login to your STEP Worldwide membership account, [here](#). If you would like to be removed from the STEP Directory, please email memberservices@step.ca.

Family Enterprise Advisor (FEA) Program

Today's families are demanding more from their advisors - expecting depth across disciplines along with superior emotional intelligence to handle the complexities of inter-family relationships. Only the [Family Enterprise Advisor \(FEA\) Program & Designation](#) prepare advisors to be fluent in the complexities of working with business families.

The program is offered online and in-person, with the [Spring 2022 Virtual Cohort](#) (starting April 5/6) and [Toronto 2022 Cohort](#) (starting May 19/20) accepting applications. STEP Members receive a 10% on program fees.

Take your advising to new heights and register today! For more information, or to get the inside scoop from

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.

December 2021 Update: CPD certificates have now 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.

[Details and registration for the 2021-22 Branch/Chapter Bundle](#)

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.

[Manager, Tax \(Succession & Estate Planning\) - Grant Thornton LLP Canada \(Vancouver, BC\)](#)

[Estates Manager - BC Children's Hospital Foundation \(Vancouver, BC\)](#)

[Director, Tax & Estate Planning - IG Wealth Management \(Any Canadian Common Law Jurisdiction\)](#)

[Market Lead / Brand Manager - Scotiabank \(Vancouver, BC\)](#)

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	March 1, 2022 June 1, 2022	February 1, 2022 May 1, 2022
STEP Canada Diploma Program	May 30, 2022 November 7, 2022	March 30, 2022 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 Re-launch

We are excited to host our first orientation session which will review the following:

- Changes to the course website
- New resources available
- Peer Leadership opportunities
- Student study sessions

The orientation session is scheduled for Tuesday February 22, 2022 at 12 EST. You must **register in advance** to receive the meeting link. The session will be recorded and posted to course websites.

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

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

Upcoming Branch & Chapter Events

**Save the date - registration opening soon*

Wed Feb 9	STEP Ottawa TEP Talk 4:45 pm ET - 5:45 pm ET Zoom	Wed Mar 2	STEP Southwestern Ontario *TEP Talk 12:00 noon - 1:00 pm ET Zoom
Wed Mar 2	STEP Winnipeg *TEP Talk 12:00 noon - 1:00 pm CT Zoom	Mon Mar 7	STEP Toronto *STEPping out to Lunch 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](#)

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

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