



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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CONTENTS:

[Don't Lose Your Memories](#)

[We Want Your Questions](#)

[2022-23 Branch/Chapter
Bundle Update](#)

[eNews Update](#)

[2022 Financial Planning Week](#)

[App Access Expiring Soon](#)

[25th National Conference](#)

[Two-Day Online Course](#)

[Practitioner Opportunities](#)

[Education Centre](#)

[Connect With Us on LinkedIn](#)

[Branch & Chapter Events](#)

[Reminders](#)

Don't Lose Your Memories Forever

STEP Canada launches the STEP Worldwide "Protect Your Digital Memories" campaign to Canadians



STEP is calling on the government and service providers like Apple, Google and Meta to do more to help people pass on their digital memories.

STEP is looking to the public to plan what will happen to their 'digital memories' - the precious photos, videos and the contents of social and email accounts that could otherwise be lost to the cloud after they have gone.

To highlight the issue and encourage people to take action, STEP has launched our "Protect Your Digital Memories" campaign.

[Read the press release here](#)

We Want Your Questions



An invitation to all members to submit questions to the 2023 CRA / STEP Canada Round Table Committee for consideration

The 2023 CRA / STEP Canada Round Table Committee invites you to submit questions to be considered for the 2023 Round Table presentation that will take place during the 25th National Conference in June 2023. Each year the much-anticipated CRA / STEP Canada Round Table proves to be a highlight of the conference; and an invaluable resource to estate planning practitioners across the country.

Your contribution to the “question bank” will be appreciated by the committee; and if selected, by thousands of practitioners.

Questions must be received by **FRIDAY, DECEMBER 30TH, 2022** for consideration. Please send your questions to:

steproundtablequestions@step.ca

2022-23 Branch/Chapter Bundles

No matter how you attend, in-person or online, the six seminars included in the 2022-23 hybrid Branch/Chapter Bundle offer in-depth technical content, excellent value, and continuing education (CPD) opportunities.

Many branches and chapters have already had two very successful events. The September seminar, "Drafting the Inclusive Estate Plan for the Modern Canadian Family" was a national online broadcast that drew in hundreds of viewers and made for a lively Q&A session. This seminar, along with a recorded version of any October in-person events, are now available to delegates for e-archived on-demand viewing in the app.

Not yet registered? Join the 750+ members and non-members who will benefit from this program's CPD and networking opportunities by registering today.

[Register here](#)

Update on Trust Reporting Rules, Reportable Transactions, and Notifiable Transactions Following the 2022 Fall Economic Statement

The Department of Finance has delayed the implementation of the enhanced trust reporting rules, which were originally going to apply for trusts' taxation years ending after December 30, 2022. Bill C-32 (link below) provides that the new requirements will now apply to trusts' taxation years ending after **December 30, 2023**. Consequently, trusts wound up before the end of 2022 would not fall within the ambit of the new

reporting rules.



[Read the full eNews article](#)

2022 Financial Planning Week

STEP Canada is pleased to once again be sponsoring FP Canada's Financial Planning Conference from November 22-24, 2022.

During the three-day virtual conference, STEP Canada will have an exhibit booth that showcases benefits of our membership, education programs, and the TEP designation. The event is expected to bring in over 1,000 financial planners, industry leaders, regulators, educators, and student delegates from across the industry.

If you are attending the conference, please stop by the booth and say 'hello' to the STEP Canada National Staff that will be manning the chat boxes!

E-Archived On-Demand App Access Expiring Soon

Members are reminded that access to all apps including the 2020 Speakers' Series, 2021 Q1 & Q2 Branch/Chapter Bundles, 2021 National Conference, 2021-22 Branch/Chapter Bundles, and the 2022 National Conference will expire on December 31, 2022.

If you still require CPD/CE credits, would like to rewatch the seminars and/or download the seminar materials, please login to the applicable app before December 31st. In order to receive CPD/CE credits, delegates must complete the seminar quiz(zes), and the certificates will be issued in January 2023. Please note that while STEP Canada will still issue CPD certificates for the hour(s) completed, some of the accreditations with governing bodies may be expired.

The presentation materials from these events are available to members in the Searchable Resource Tool (SRT).

If you have questions or need assistance accessing an app, please email memberservices@step.ca.

Upcoming Event: Two-Day Online Course

First Two-Day Online Course - Canada/US Cross-Border Estate Planning

Our full-day course is back with a twist! Join us online for two days from the comfort of your home or office for a mix of recorded and live online interactive learning.

Instructors:

Leslie Kellogg, JD, TEP, Buffalo/Toronto: Hodgson Russ LLP
Carol Fitzsimmons, JD, TEP, Buffalo/Toronto: Hodgson Russ LLP
Britta McKenna, JD, Buffalo/Toronto: Hodgson Russ LLP
Paul Gibney, LLB, TEP, Toronto: Thorsteinssons LLP

Course Focuses:

Overview of US Income, Gift, and Estate Taxes
Cross-Border Estate-Planning Design and Drafting
Trusts, Trusts, and More Trusts
Everyone's Worst Nightmare: The US Anti-Deferral Rules
In-Depth Cross-Border Pre-Mortem and Post-Mortem Planning Involving Corporations and Trusts
Comings & Goings
Canadians Who Winter in the United States

5 hours per day + breaks = 10 hours of CPD!

Registration now open! Members \$425 | Non-Members \$575

[Details and Registration](#)



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.

[Estate Professional - ClearEstate \(Remote, Canada\)](#)

[Trust Officer - Solus Trust \(Vancouver, BC\)](#)

[Trust Administrator - Solus Trust \(Vancouver, BC\)](#)

[Regional Trust Officer - MD Financial Management \(Montreal, QC\)](#)

[Estate and Trust Advisor - MD Financial Management \(Winnipeg, MB\)](#)

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, 2023 June 1, 2023	February 1, 2023 May 1, 2023
STEP Canada Diploma Program	May 29, 2023	March 29, 2023
Essay Submission	May 1, 2023 October 1, 2023	New topics for 2023 will be released in January 2023.

Updates

Diploma Program

The grade release date for the November 7th exams is **December 5, 2022**. Grades will be posted to your MY STEP account under "My Courses & Marks". An announcement will be posted to your course website once marks are available.

Connect With Us on LinkedIn

Join our online community and stay connected to your fellow practitioners and STEP Canada staff. We encourage all our members to be active and contribute through our corporate and individual branch/chapter groups. Our goal is to provide a forum for our members to explore their shared experience as trust and estate practitioners.

Follow STEP Canada's corporate page.

You can find the link to your local branch/chapter group on the STEP Canada corporate page.

Need help? View the **LinkedIn Cheat Sheet**.

Upcoming Branch & Chapter Events

Click to view the entire upcoming schedule for the 2022-23 Branch/Chapter Bundles.

Save the Date

Tues
Dec 6

**STEP Montreal
Seminar & Cocktail Party**
4:00pm - 7:00pm ET
Miller Thomson S.E.N.C.R.L./s.r.l., Montreal

Save the Date

Thur
Dec 8

**STEP Ottawa
Holiday Social Event**
5:00pm - 7:00pm ET
CIBC Wood Gundy, Ottawa

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