

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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## 2021-22 STEP Canada Branch/Chapter Bundles

### CONTENTS:

**2021-22 Branch/Chapter Bundles**

**STEP Private Client Awards**

**Board of Directors**

**Family Enterprise Advisor**

**Past Event CE/CPD Credits**

**Share the Benefits of STEP**

**Practitioner Opportunities**

**Education Centre**

**Branch & Chapter Events**

**Reminders**

**Contact Us**

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Did you miss the first seminar of the 2021-22 Branch/Chapter Bundles, “**Estate Planning Across International Borders**”? 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 and earn valuable CE/CPD credits.

See what our delegates have said:

*“I thought that the interaction among the speakers was well-organized and easily followed.”*

*“Wonderful to have the material to look back on... to enhance the learning as well as a reference to the subject material, and/or accessing the presenters, if and when needed in the future.”*

### Coming Soon

Each branch/chapter will be hosting their first local session of the 2021-22 Branch Bundle shortly! Check out the program schedule for your branch or chapter to find out when to tune in, and don't forget to register!

[Details and registration](#)

## 16th Annual STEP Private Client Awards Winner

STEP Canada is thrilled to congratulate **NIKA LAW LLP** for their two well-deserved wins at the **16th Annual STEP Private Client Awards**.

The STEP Private Client Awards are seen as the hallmark of quality within the private client industry. Open globally to both STEP members and non-members, these prestigious Awards recognize and celebrate excellence.

Presented virtually on September 23, 2021, NIKA LAW LLP was the successful winner in:

### **Boutique Firm of the Year**

#### **Judges Comments:**

*This year’s winner operates in a challenging sector and really stood out for their compassion and commitment to those who cannot afford or are worried about attaining legal services. Their submission provided some impressive examples of client service that truly has the interest of its clients at heart. A really strong winner!*

and

### **Vulnerable Client Advisory Practice of the Year**

#### **Judges Comments:**

*The judges were incredibly impressed by this year’s winner. It’s dynamic and culturally diverse practice reaches out to minority and marginalized groups with empathy and understanding. It is clearly establishing itself as an advocate for both policy and legislative change.*

Please join us in congratulating NIKA LAW LLP for their success.

[More information](#)

## STEP Canada Presents it's 2021-22 Board of Directors The Globe & Mail

The Saturday, September 18th edition of The Globe & Mail featured the presentation of STEP Canada's 2021-22 Board of Directors. The 17 STEP members that make up our national board are leaders in the trust and estate industry.

This Board of Directors assumes a leading role in communicating the views of Canadian members to governments, tax authorities, regulators, and the public.

With a deep appreciation for their vision and leadership, please join us in thanking them for their dedicated support to STEP Canada and the trust and estate industry!

[View our update on LinkedIn here](#)

## Family Enterprise Advisor (FEA) Program

The **Family Enterprise Advisor (FEA) Program** augments your technical skills with a more nuanced level of understanding around business families and their unique challenges. We are excited to announce our return to the classroom. The **Winter 2022 cohort** in Vancouver starts Jan 18/19. Take your advising to new heights and register now! STEP Members receive a 10% discount. For more information or to get the inside scoop from a certified TEP, FEA, contact Tim Mohr at [tmohr@familyenterprise.ca](mailto:tmohr@familyenterprise.ca).



*"The FEA program taught me how to serve my clients with greater impact. I now start by asking more thought provoking questions. . . It consistently unearths more considerations that lead to better and more meaningful solutions – not just from a financial perspective, but outcomes that serve the family for the better."*

Sloan Levett CPA, CA, CFP, TEP, FEA  
Fuller Landau Family Office Services Inc.

## CE/CPD Credits for Past Events

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

If you have not yet viewed the sessions 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.

Don't forget - registration is still open for both events if you require CE/CPD credits!

[Details and registration for the 2021 Q1 & Q2 Branch Bundle](#)

[Details and registration for the 23rd National Conference](#)

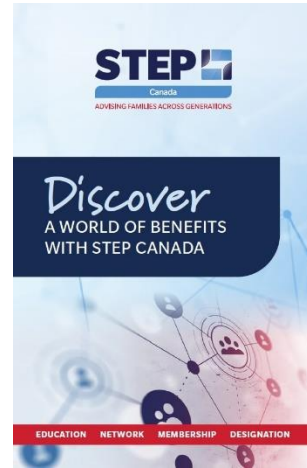
## Share the Benefit of STEP

**Did you know?**

STEP represents over 22,000 members Worldwide and over 3,000 members in Canada, and is the leading international organization for trust and estate professionals who specialize in family inheritance and succession planning. The TEP designation is an internationally recognized hallmark of professional expertise, and we are always welcoming new members to join!

If you have a colleague you think would be interested in, or benefit from STEP membership, you can share [this brochure](#) with them and invite them to contact our Member Services team at [memberservices@step.ca](mailto:memberservices@step.ca) for more information on how to join.

You can find more information on our website, [here](#).



## 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.

**Trust Officer - TD Private Wealth Management (Nanaimo/Qualicum Beach)**

**Wills & Trust Resource Consultant - RBC Wealth Management (British Columbia)**

**Senior Trust Advisor - Raymond James Ltd (Vancouver)**

**Trust Officer/ Wills Legal Professional - ClearEstate (Toronto)**

**Legacy Officer - Scotia Wealth Management (Vancouver)**

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 Diploma Program	May 30, 2022 November 7, 2022	April 30, 2022 October 7, 2022
Essay Submission	May 1, 2022 October 1, 2022	*2022 topics can be found <a href="#">here</a>

## Upcoming Branch & Chapter Events

*\*Save the date - registration coming soon*

Wed Oct 13	<b>STEP Ottawa</b> TEP Talk 5:00 pm - 6:00 pm ET Zoom	Thurs Oct 14	<b>STEP Edmonton</b> Student Study Group 4:30 pm - 6:00 pm MT Zoom
Wed Oct 27	<b>STEP Winnipeg</b> Virtual Student Event 12:00 pm - 1:30 pm CT Zoom	Mon Nov 1	<b>STEP Toronto</b> *STEPping out to Lunch 11:45 am - 1:00 pm ET Zoom
Wed Nov 3	<b>STEP Southwestern Ontario</b> *TEP Talk 12:00 noon - 1:00 pm ET Zoom	Wed Nov 3	<b>STEP Winnipeg</b> *TEP Talk 12:00 noon - 1:00 pm CT 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](mailto: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.

[RETURN TO TOP](#)

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

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