



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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## Final Questions & Answers from the 2022 CRA/STEP Canada Round Table



Our highly anticipated 2022 CRA/STEP Canada Round Table session was presented on Wednesday, June 15th. During this session, senior CRA representatives answered questions submitted by trust and estate professionals regarding specific cases and general issues of concern for both practitioners and their clients.

STEP Canada members can access this resource in their My STEP Canada Portal under the Resource Box: STEP/CRA Round Table Q&As, after logging on to [step.ca](https://step.ca). Please note, as the CRA representatives announced at the end of the Round Table, an additional question and response (question #18) has been included in the document that was not presented in the Round Table.

**[More information](#)**

**We Want Your Questions**



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

The 2023 CRA / STEP 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 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](mailto:steproundtablequestions@step.ca)**

## **2022-23 Branch/Chapter Bundle Update**

On Wednesday, September 21st, hundreds of delegates tuned in to kick off the 2022-23 Branch/Chapter Bundles with our first national seminar "Drafting the Inclusive Estate Plan for the Modern Canadian Family".

**Comments:**

"Very eye opening as to culture and religious context and how it applies to Estate Planning."

"Topic was enlightening. I had never considered religious implications an issue in will and estate planning."

"I am very thankful to our panel - Yaser Ali, Sara Cohen, and Raphael Tachie – for presenting on this important topic. As the diversity of families (whether in terms of gender, ethnic, religious, cultural, or other identities) in Canada increases, estate planning needs to evolve to fit the needs of our clients and those that they care for. I hope that this session offered a helpful perspective to the audience in considering the various aspects of diversity that might impact an estate plan."

– Harmanjit Mavi, Moderator

The e-archived on-demand version of this seminar is available to registered delegates through the Branch Bundle Attendee Hub/App.

**Not yet registered?** Join the 600+ members and non-members who will benefit from this program's CPD and networking opportunities by registering today.

**[Register here](#)**

## New STEP Worldwide Council Appointment

STEP Canada is pleased to congratulate **Kimberly Whaley**, Whaley Estate Litigation Partners, on her new appointment to the STEP Worldwide Council. Kimberley was elected by Full members of STEP Canada to represent our region globally. She will play an integral part in advising the STEP Board of Directors on aspects of STEP's strategic journey, as well as matters of interest to the wider membership. STEP Council members are the primary channels for communication and representation between members and governance bodies.

Please join us in congratulating Kimberly on this new role!

## CE/CPD Credits for Past Events

**Members are reminded that access to all apps including the 2020 Speakers' Series, 2021 Q1 & Q2 Branch Bundles, 2021 National Conference, 2021-22 Branch/Chapter Bundles, and 2022 National Conference will only be available until December 31, 2022. The presentation materials from these events are available in the Searchable Resource Tool (SRT).**

CPD certificates have now been sent for the 2021-22 Branch/Chapter Bundles and the 24th National Conference. Supplementary certificates will be sent out in January 2023 for all sessions viewed between September 12, 2022 and December 31, 2022.

If you have concerns regarding your credits, please email [memberservices@step.ca](mailto:memberservices@step.ca).

## Resources for Members

### Executing Estate Documents in Canada in 2022:

#### **Covid-19 Amendments and How to Effect Safe (And Valid) Signings**

STEP Canada has prepared a resources chart for its members to reference the options for having documents signed in each province and territory. The updated guide is effective as of September 20, 2022. Members can access the most current version of this resource in their My STEP Canada Portal under the resource tab, after logging in to [step.ca](https://step.ca). This document will be continually updated as policies change.

#### **Public Facing Website: <https://advisingfamilies.org/canada/>**

This website provides information to help families plan for their futures. Members, please consider sharing this website with your clients, it is a useful tool for providing clarity about these complex issues. The articles are currently being reviewed and updated. Thanks to the Member Services Committee for its work on this beneficial project.

## Family Enterprise Advisor

**Only the Family Enterprise Advisor (FEA) Program prepares you to be fluent in the complexities and nuances of serving business families.**

The **FEA Designation** is the global benchmark in family business advising. Designed for professionals with significant technical knowledge, taking the FEA Program will enhance your ability to serve your family enterprise clients. In the crowded field of family enterprise advising, there is one sure way to stand out: the FEA Designation.

In 2023, we will be offering you three opportunities to become “fluent in family enterprise”. The FEA Program will now feature a blend of virtual and in-person delivery in several exciting locations across Canada! Connection and convenience in one executive education experience. Register for the 2023 FEA Program today! **STEP Members receive a 10% discount.**



*"For almost 20 years, I have been practicing tax and estate planning law and consider myself to be a trusted advisor to my clients. My clients are predominantly owner managed businesses, many of which are enterprising families. It wasn't until taking the FEA Program in 2021 that I realized that being the trusted advisor to a family enterprise means much more than just answering technical legal questions. As an FEA, I can now speak to both the technical aspects of estate planning and ask probing questions that make clients think deeper about the decisions they are making and the lasting impact they will have on the family as a system."*

**Elise Pulver, LL.B., TEP, FEA**  
Principal, Wealth Planning Lead  
TD Wealth Family Office

## 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 Tax Accountant - RLB LLP (Remote)**

**Private Trust Manager - TD Private Wealth (Edmonton, AB)**

**Regional Trust Officer - MD Financial Management (Remote)**

**Trust Associate - Raymond James Ltd. (Montreal, QC)**

**Director of Indigenous Trust Services - Wyth Trust (Remote)**

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	November 7, 2022 May 29, 2023	Registration Closed March 29, 2023
Essay Submission	May 1, 2023 October 1, 2023	New topics for 2023 will be released in January 2023.

## Updates

### Diploma Program

Instructor tutorial sessions and exam procedures meetings will take place mid October. Registration and additional details are on your course website.

Reminder that the Diploma Program exam date is November 7, 2022. Good luck to all students writing on this day.

### Certificates

Program completion certificates for both the Diploma Program and CETA will be mailed out to all those that have finished a STEP Canada education program between 2020 and the most recent term. The preferred address in your STEP Canada profile will be used.



## 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.

Thur Oct 13	<b>STEP Toronto</b> <b>STEPping out to Lunch</b> 11:45am - 1:00pm ET Zoom	Tues Oct 17	<b>STEP Edmonton</b> <b>Student Networking Event</b> 5:00pm - 7:00pm MT Rec Room, Edmonton
Wed Oct 18	<b>STEP Ottawa</b> <b>Student Networking Event</b> 5:00pm - 7:00pm ET Rabbit Hole, Ottawa	Thur Oct 19	<b>STEP Vancouver</b> <b>Student Networking Event</b> 4:00pm - 6:00pm PT Glitch Vancouver
Tues Oct 25	<b>STEP Calgary</b> <b>Student Study Group</b> 4:00pm - 6:00pm MT Zoom	Wed Nov 2	<b>STEP Winnipeg</b> <b>TEP Talk</b> 12:00pm - 1:00pm CT Zoom

## 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.

### [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](http://step.ca)