

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 Branch/Chapter Bundle Registration Now Open!



Don't miss out! Register now to join us on **\*Wednesday, September 15th** to kick off the 2021-22 program season with the first Branch Bundle National seminar, *Estate Planning Across International Borders*. Our panelists **Cheyenne Reese, Leigh-Alexandra Basha, Sébastien Desmarais, Line-Alexa Glotin, and Jennifer Smithson** will present multi-jurisdiction perspectives on estate planning, taxation on death, and more.

[Details and registration](#)

*\*this seminar is only available with your purchase of a Branch Bundle*

## 16th Annual STEP Private Client Awards

Join us on **September 23rd** at **4:30 PM BST/ 11:30 AM EST** for the 16th annual STEP Private Client Awards virtual ceremony! This complimentary ceremony will celebrate the success and recognize the achievements of practitioners, teams and firms from around the world.

Best of luck to the four Canadian finalists:

**NIKA LAW LLP**  
*Boutique Firm of the Year*  
and  
*Vulnerable Client Advisory Practice of the Year*

**Clark Wilson LLP**  
*Contentious Trusts and Estates Team of the Year (midsize firm)*

**KPMG Private Enterprise**  
*Family Business Advisory Practice of the Year*

[View 2021 finalists](#)

[Details and registration](#)

## Vulnerable Client Symposium Final Report

On March 8, 2021, STEP Canada's Public Policy Committee hosted a symposium to start a cross sector conversation on the issues, barriers, and opportunities to better serve and support vulnerable clients. Seventy-nine invited leaders and professionals who have devoted their energies to preventing, recognizing, and responding to the abuse and mistreatment of vulnerable people had candid conversations about the challenges and the need to collaborate to support systemic change.

The final report (linked below) documents the dialogue and ideas that were generated and includes a list of initial suggestions and resources. STEP Canada is now in the process of identifying and prioritizing the strategies and activities that we can pursue to help advance these ideas.

As a member of STEP, we hope you will find the report beneficial to your practice and encourage you to keep this critical issue in your conversations with colleagues and clients.

*"..... I wanted to send a short note to congratulate you on this important initiative that you led. The report is very thoughtful and I hope that it helps stimulate discussion and change."*

- STEP Canada Member

[View the report](#)

## 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 and Estate Technician - Bossy Nagy Group (Tillsonburg)**

**Senior Trust Officer - RBC Royal Trust (Calgary)**

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

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	November 1, 2021 May 30, 2022	October 1, 2021 April 30, 2022
Essay Submission	October 1, 2021* May 1, 2022	*2021 topics can be found <a href="#">here</a>

**Diploma Students:** STEP is hosting it's first orientation \*session for new students in the diploma program on September 22, 2021 at 12PM EST. While this session is geared towards those new to the program, all students are welcome to attend as it is our first offering. The session will cover: review of the diploma program, general exam information and procedures, MY STEP Portal and Learning Centre navigation, administrative procedures, and a live Q&A. The presentation portion of the session will be recorded and posted to course websites. If you wish to attend, register [here](#).

*\*This session is being delivered in English but is applicable to both the common and civil law programs.*

**CETA Students:** Grades from the September 1<sup>st</sup> exam will be published to the MY STEP account by October 5<sup>th</sup>, 2021.

## Upcoming Branch & Chapter Events

*\*Save the date - registration coming soon*

Wed Sept 15	Estate Planning Across International Borders <i>As part of the 2021-22 Branch/Chapter Bundles</i> September 15, 2021 12:00 noon - 2:00 pm ET	Mon Oct 4	STEP Toronto <i>*STEPping out to Lunch</i> 11:45 am - 1:00 pm ET Zoom
Wed Oct 6	STEP Calgary <i>*TEP Talk</i> 8:00 am - 9:00 am MT Zoom	Wed Oct 6	STEP Winnipeg <i>*TEP Talk</i> 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.

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

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