



eNews – April 27, 2020
STEP Canada Trust & Estate Technical Committee

**RE: Executing Estate Documents in Canada in 2020:
Covid-19 Amendments and How to Effect Safe (And Valid) Signings**

STEP Canada has prepared a resource chart for its members to reference the options for having documents signed in each province and territory. While the normal requirements still remain valid, provinces are, in some cases, making available alternatives to signing documents while abiding by physical distancing requirements. The chart is not intended to replace the complete language of each applicable statute, and there may be technicalities specific to your province or territory not included. However, the basic signing provisions are included in an effort to provide guidance in this uncertain time with respect to executing estate documents and ensuring they withstand judicial scrutiny if later challenged. In this unprecedented time, there is room for creativity to the benefit of estate practitioners.

STEP Canada has representatives of its Trust and Estate Technical Committee throughout Canada monitoring its jurisdictions. The chart will be updated as quickly as we learn of any new developments.

STEP Canada members can access the most current version of this resource in their My STEP Canada Portal under the Resource Box, after logging on to step.ca

Several members of STEP Canada contributed to this document, in particular:

- Richard Niedermayer, TEP: Secretary, STEP Canada; Stewart McKelvey, Halifax and
 - Madeleine Coats: Articled Clerk, Stewart McKelvey, Halifax
- with input from
- Timothy Matthews, TEP: Chair, Trust and Estate Technical Committee; Stewart McKelvey, Halifax

Our thanks to all who provided input.

STEP Canada Trust & Estate Technical Committee

About STEP: The Society of Trust and Estate Practitioners is the leading international organization for trust and estates professionals. Headquartered in London, England, it has more than 22,000 members worldwide in 95 countries.

STEP Canada, founded in 1998, has 3,000 members with branches in the following cities and regions: Atlantic, Montreal, Ottawa, Toronto, Winnipeg, Calgary, Edmonton, Vancouver and chapters in Okanagan Valley, Saskatchewan, and Southwestern Ontario. STEP is a multi-disciplinary organization with the most experienced and senior practitioners in the field, including: lawyers, accountants, financial planners, insurance advisors and trust professionals. They provide domestic and international advice on trust and estates, including planning, administration and related taxes.

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