



eNews – September 19, 2022

**STEP Canada Tax Technical Committee / National Conference Committee**

**RE: Final Questions & Answers from the 2022 CRA/STEP Canada Round Table**

The STEP Canada Board of Directors is pleased with the success of the STEP Canada 24th National Conference, which again became our largest ever event bringing in over 960 delegates from around the country and housed in a virtual environment.

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 would like to thank the following panel participants for their contributions in preparing and presenting this year's Round Table session:

**Christine Van Cauwenberghe**, LLB, CFP, RRC, TEP, Winnipeg: IG Wealth Management  
**Michael Cadesky**, FCPA, FCA, FTIHK, CTA, TEP, Toronto: Cadesky Tax  
**Kim G.C. Moody**, FCPA, FCA, TEP, Calgary: Moodys Tax / Moodys Private Client  
**Steve Fron**, CPA, CA, TEP, Oshawa: Manager, Trust Section II, Income Tax Rulings Directorate, Canada Revenue Agency  
**Marina Panourgias**, CPA, CA, TEP, Toronto: Manager, Trust Section I, Income Tax Rulings Directorate, Canada Revenue Agency

We are pleased to deliver the final 2022 CRA/STEP Canada Round Table Questions & Answers to STEP Canada members and conference delegates. 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](http://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.

We sincerely appreciate all the time and effort our industry experts devote to crafting the programming for this event. STEP Canada national committees work closely and cooperatively with the Canada Revenue Agency to maintain a relationship that benefits our valued members and conference delegates.

STEP Canada Tax Technical Committee  
STEP Canada National Conference 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 100 over countries.

**STEP Canada**, founded in 1998, has over 3,250 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.

Suite 510, 45 Sheppard Avenue East  
Toronto, ON M2N 5W9  
1-877-991-4949  
[www.step.ca](http://www.step.ca)