



Canada

ADVISING FAMILIES ACROSS GENERATIONS

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The Society of Trust and Estate Practitioners (STEP) is committed to raising the public profile of professionals working in the trust and estate field. STEP members must meet rigorous educational standards and engage in continuing professional development to hold the trust and estate practitioner (TEP) designation. Currently, there are 2,000 TEPs in Canada, and another 925 professionals who are enrolled in STEP's domestic education program working toward their TEP designation. Worldwide, STEP has 22,000 members in 100 countries.

STEP members work with families and family businesses, helping them with estate and succession planning, both domestically and internationally, while protecting the interest

of their spouses, children, and elderly or vulnerable relatives. Today, many families are spread across the globe. Estate plans must therefore comply with the tax and succession laws of various jurisdictions to ensure estates and family businesses pass safely from one generation to the next.

STEP Canada's national board and committees assume a leading role in communicating the views of Canadian members to governments, tax authorities, regulators, and the public. All over the world, STEP works with governments and regulatory authorities to examine the probable effects of proposed changes in the law, provide technical advice and support, and respond to requests for consultations.



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