



April 8, 2026

Communication to STEP Members in Alberta

RE: Request for Feedback - Alberta Trustee Act

Dear STEP Member,

As you are probably aware, a new [Trustee Act](#) (the "Act") came into force in Alberta on February 1, 2023. Some additional context about the Act is included below.* At the request of the Government of Alberta (Alberta Justice), STEP Canada is soliciting any feedback you may have with respect to the Act.

- Have you had an opportunity to engage with the provisions of the Act in detail?
- Has the Act been helpful in your practice? If so, how? What provisions of the Act have you specifically relied on?
- Are there any provisions of the Act that you consider problematic or that may have unintended effects? Are there provisions that you routinely draft around? If so, what changes would you suggest?
- Do you have any other comments or suggestions that Alberta Justice should take into account in considering whether any changes should be made to the Act?

Please provide any feedback no later than May 8, 2026 by email to Michael Dodick at mdodick@step.ca. Responses will be reviewed and incorporated into a consolidated submission by STEP Canada to Alberta Justice in late May. Thank you in advance.

*Per Alberta Justice: The new Act was based on the Uniform Trustee Act recommended by the Uniform Law Conference of Canada (ULCC) in 2012. The Alberta Law Reform Institute (ALRI) reviewed the Uniform Trustee Act to determine if and how it should be recommended for enactment in Alberta. In November 2015, this resulted in Report for Discussion 28, A New Trustee Act for Alberta. In January 2017, ALRI issued Final Report 109, A New Trustee Act for Alberta which recommended adopting the Uniform Trustee Act with some provisions modified and some existing provisions continued to reflect best trust practice in Alberta.

Vickie Schneider, TEP
Chair, STEP Calgary

Michelle Millard, TEP
Chair, STEP Edmonton

Supported by **Katherine Ratcliffe**, TEP, Deputy Chair, STEP Calgary

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 over 100 countries.

STEP Canada, founded in 1998, has over 4,000 members with branches in the following cities and regions: Atlantic, Montreal, Ottawa, Toronto, Winnipeg, Saskatchewan, Calgary, Edmonton, and Vancouver, with chapters in Okanagan Valley and Southwestern Ontario. STEP is a multidisciplinary organization with the most experienced and senior practitioners in the field, including lawyers, accountants, financial planners, insurance advisors, trust professionals and wealth managers. They provide domestic and international advice on trust and estates, including planning, administration, and related taxes.

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