



Newsletter Vol. 14 | Issue 2 | February 10, 2026

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!

[NEW STEP Canada Website](#)

[STEP Member Directory](#)

[STEP Worldwide Website](#)

[Practitioner Opportunities](#)

Updated STEP Canada Website!

STEP Canada is proud to announce the launch of our updated website - a fully redesigned and improved hub for members, professionals, and the public, aimed at elevating the presence of STEP and TEPs.

Our website now features brand new sections, such as:

- Why Hire a TEP Professional
- A Day in the Life
- What a STEP Membership Can Do for You
- Volunteers
- Outreach & Development
- News & Views

While also maintaining familiar pages such as Practitioner Opportunities, the Events Calendar, Awards, and more. Members will also notice that their MY STEP Canada portals have been updated.

We invite you to explore the updated website using the link below:

[View STEP Canada's New Website](#)

STEP Canada's 28th National Conference Last Chance for Early Bird Rates!



28TH NATIONAL CONFERENCE
STPCANADA
Building Connections, Sharing Knowledge.

JUNE
1-2, 2026
SHERATON CENTRE
TORONTO HOTEL



Register before February 15th at 11:59pm ET to take advantage of our special offer and confirm your spot at the premier annual gathering of trust and estate professionals! Select registration types receive \$100 off - but only for a limited time.

Don't miss out! Demand for this event grows each year, and in-person attendance sells out quickly. To secure your spot and maximize the unmatched networking available onsite, we strongly encourage early registration.

"I loved reconnecting with old friends and colleagues, and making new connections. The sessions were interesting and I know I will refer back to the written content many times in the future."

This must attend event for practitioners in this industry offers an exceptional mix of networking, practical learning, and continuing education opportunities.

Secure Your Spot

21st Annual STEP Private Client Awards



The banner features the STEP logo on the right with the tagline 'ADVISING FAMILIES ACROSS GENERATIONS'. On the left, a gold star graphic contains the text '21st Annual STEP PRIVATE CLIENT Awards'. The central text reads 'ENTRIES NOW OPEN!' in gold. Below this, on the left, is the text 'Showcase your excellence to your peers and clients' and 'Entry deadline: April 10, 2026'. On the right, it says '25 categories open for entry' above a gold button that says 'ENTER NOW'.

Get your submissions ready for the 21st Annual STEP Private Client Awards, and have the chance to be recognized and celebrated on the global stage! Seen as the hallmark of quality within the industry, 25 unique categories will be open for entry until April 10th, 2026. Winners will be announced at the Awards Ceremony in London, UK on September 17, 2026.

"Being recognised on a global scale with such a prestigious award gives us tangible proof for our commitment to excellence."

- Patricia Saputo, TEP, Crysalia - Montreal, QC
Winner of Family Business Advisory Practice of the Year 2024

[Learn More](#)

STEP's Digital Asset Learning Opportunities

STEP CPD Learning Course: Digital Assets



Confidently navigate digital assets in estate planning and administration with the knowledge and skill essential for today's digital world.

This course, run by the Global STEP education training partner CLTI, will equip you with the practical tools and expert insight to meet growing client demand, support families during incapacity or bereavement, apply consistent best-practice approaches, and minimise risk by ensuring digital assets are properly identified, valued, and transferred.

An optional end of course assessment comprising 10 multiple-choice questions is included, and upon successful completion, you will receive a certificate to recognise your achievement.

Discounts are available for STEP members and STEP Employer Partners.

[Details & Registration](#)

STEP Canada National Webcasts - Available On-Demand

Registration is still available for the two recent STEP Canada National Webcasts, **Beyond the Indian Act: A Primer on Estates, Succession, Tax and Trusts for Indigenous Clients**, and the **2025 Federal Budget Webcast**. The on-demand version of these broadcasts will be available until June 30, 2026.

These valuable webcasts were broadcast in English, and are offered free of charge for STEP Canada members and Students.

Details & Registration

Registration Open for 2025-26 Program Season Events

There is Still Time to Register for the 2025-26 Program Season!

For the past five months, members and delegates have been benefiting from can't-miss networking opportunities and valuable CPD seminars, designed to support professional growth and connections.

If you haven't registered yet, not to worry - there is still time! Whether you are looking to expand your knowledge or connect with fellow trust and estate professionals, there is something for everyone in this season's schedule. We hope to see you at an event before the season is finished!

Did you know: Branch Bundle registrants will have access to online on-demand replays until December 31, 2026?

For more information, click the link below and select your branch or chapter.



2025-26 Seminars & Events

STEP Starts Here - Getting Involved

In this section, volunteers from across the country will share how they took the first STEP to get involved - and where it has led them.



Sébastien Desmarais, TEP
TD Wealth, Wealth Advisory Services
STEP Ottawa

"Getting involved in STEP Canada has been one of the most fulfilling decisions I've made, both professionally and personally. The opportunity to exchange with colleagues and learn from each other brings invaluable knowledge. Initially, I had a simple desire to contribute to the tax, trust and estate community. As a member of the STEP Canada National Conference Committee, the Tax Technical Committee, and while writing articles for STEP Inside publications, I have contributed meaningfully to the professional community and reiterated my commitment to my profession.

On a professional level, volunteering with STEP Canada opened opportunities I would not have encountered elsewhere. I've met colleagues who became friends and I've worked on various presentations and submissions with fellow TEPs and STEP staff, allowing me to deepen my subject matter knowledge. Through the years, I've gained valuable experience that strengthened my professional profile and clarified my career goals. Through this involvement, I've also expanded my network, met inspiring partners, and learned from individuals whose passion and expertise motivated me to aim higher.

Personally, the experience was just as fulfilling. Getting involved with STEP Canada gave me a strong sense of belonging and purpose. Knowing that my time and efforts were contributing to something bigger than myself was incredibly fulfilling. I became more confident in my abilities and more aware of the positive difference one person can make. The relationships I built along the way turned into meaningful friendships, grounded in shared values and a common mission.

Beyond the skills and experiences, what I've gained most is perspective. Being involved with STEP Canada reminded me of the importance of commitment and how valuable it is to contribute to an organization that aligns with my values. It taught me to listen more and to remain open to learning.

I wholeheartedly encourage others to get involved and volunteer with STEP Canada. Whether you are looking to gain experience, meet new people, or simply give back, STEP Canada offers something valuable to all its members. From my experience, the rewards go far beyond what you give. You grow, you learn, and you become part of something meaningful.

Getting involved in STEP Canada has been a journey of growth, connection, and purpose. It is an experience I am deeply grateful for, and one I strongly encourage others to embrace."

Sébastien is currently Co-Chair of the 2026 STEP Canada National Conference Program Committee and Co-Chair of STEP Canada's Tax Technical Committee. He is a regular speaker and moderator at local and national STEP seminars and conferences, and a contributing author for STEP Inside.

There are many ways to deepen your involvement with STEP while building your expertise and expanding your network. Attend a technical seminar, connect at a networking event, contribute your knowledge as a speaker, or make an impact by volunteering on a committee.

For more information on how to engage with STEP, reach out to your local Member Services Officer.

Are you interested in sharing your volunteer journey with STEP members and encouraging others to become involved? Send us an email with your story to memberservices@step.ca.

Find Your Local Board Members

Coming Soon: 2026-27 Membership Renewals

At the beginning of March 2026, all STEP Canada members will be mailed their annual renewal package containing details for this year's renewal period, and at the same time your MY STEP account will open for processing membership renewals.

The deadline to renew your membership is April 1, 2026.

Please login to your MY STEP account via the link below to verify that your mailing information and contact details are correct.

Watch your inbox in early March for details on how to renew!

[Login To MY STEP](#)

Recent STEP Canada eNews

February 6, 2026:

STEP Canada Tax Technical Committee

[RE: Legislation Pertaining to the Flipped Property Rules](#)

Looking for Accredited CPD? We've Got You Covered

Local and National STEP Canada events are designed to meet the continuing education requirements for provincial law societies, governing bodies, and professional associations by offering unique and timely technical content. Members can also fulfill their STEP CPD requirements by attending seminars that align with their reflective development goals. STEP Canada applies for accreditation, where required, for all relevant paid technical seminars to support its membership and their professional outcomes.

Did you know we apply for CPD accreditation from these bodies?

- Alberta Insurance Council (AIC) - *if applicable**
- Canadian Investment Regulatory Organization (CIRO) - formerly MFDA
- FP Canada
- The Institute for Advanced Financial Education (IAFE)
- Insurance Council of Manitoba (ICM) - *if applicable**
- Law Society of British Columbia (LSBC)
- Law Society of Ontario (LSO) - *if applicable***

**if seminar is based on insurance*

***only for professionalism hours*

The following bodies recognize STEP activities for continuing education credits with no formal accreditation application required, and the standard issued CPD certificate for verification of hours will suffice for your records:

- Barreau du Québec and the Chambre des notaires du Québec
- Chartered Professional Accountants (CPA)
- Law Society of Alberta
- Law Society of British Columbia - *for substantive hours*

- Law Society of Manitoba
- Law Societies of Nova Scotia, New Brunswick, Prince Edward Island, and Newfoundland and Labrador
- Law Society of Ontario - *for substantive hours*
- Law Society of Saskatchewan
- Society of Trust and Estate Practitioners (STEP)

If you have questions relating to your CPD certificates or would like more information, please email memberservices@step.ca.

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.

Have questions?

[More on Practitioner Opportunities](#)

or

[Post an Opportunity](#)

Outreach & Development: Find Us in Your Community

| Date & Location | Event & Location | Type of Outreach |
|--|--|---------------------------------------|
| February 10, 2026 Halifax | University Lunch & Learn, Schulich School of Law, Dalhousie University | Lunch & Learn for University Students |
| February 19 - 20, 2026 Vancouver | The Estates, Trusts and Pensions Journal Conference at the Peter A. Allard School of Law, UBC | Sponsor, Exhibitor |
| February 19, 2026 Ottawa | University Lunch & Learn, University of Ottawa (Bilingual Session) | Lunch & Learn for University Students |
| February 24, 2026 Kingston | University Lunch & Learn, Queen's University | Lunch & Learn for University Students |
| March 23, 2026 Edmonton | University Lunch & Learn, University of Alberta | Lunch & Learn for University Students |

We look forward to engaging with our trust and estate community at courses and industry events.

More information can be found on the Outreach and Development section of our website, below:

Outreach & Development



Photo to the left:

STEP Members Jo-Anne (Jodie) Stark, TEP, and Amanda Doucette, TEP, joined law students at the University of Saskatchewan College of Law to discuss where a career in trusts and estates can take you.

Thank you for sharing your expertise with the next generation of practitioners!

Education Centre

Education Program

Exam/Essay Date

Registration Deadline

| | | |
|---|--|--|
| CETA 1-4 | All CETA exams are available online on-demand. Must be completed within 12 months of registration. | Registration open on a rolling basis for on-demand exams |
| NEW: Investment Basics for Fiduciaries (IB) 1-4 | Assessments are available on-demand. Final course assessment must be taken within 12 months from enrollment. | Registration is open on a rolling basis. |
| STEP Canada Diploma Program (All Courses) | May 25, 2026 November 2, 2026 | March 1, 2026 September 1, 2026 |
| NEW FOR FULL MEMBERS: Taxation of Trusts & Estates (Standalone course) | May 25, 2026 | March 1, 2026 |
| Essay Submission | May 1, 2026 | 2026 topics can be found here |

Education Program Updates

Diploma Program:

To help support your preparation for the upcoming May exam, STEP Canada will be hosting two live-virtual tutorial sessions (English stream) and one tutorial session (French stream) for each course. To find your specific session dates and times, along with the registration links, please check your course website for more information.

Single Course Registration for Taxation of Trusts & Estates

Full members can now access the second course in the STEP Canada Diploma Program, Taxation of Trusts and Estates. Login to your MY STEP account to register for this course. This comprehensive course offers you the opportunity to prepare with tax basics or start directly with the trust and estate tax topics. A live virtual case study series and instructor resources are available. If you have questions, reach out to education@step.ca.

[Login To MY STEP](#)

NEW Certificate Program

Investment Basics for Fiduciaries (IB)

Designed for trust and estate professionals, this program provides essential investment knowledge for those that administer estates, trusts, and manage the financial affairs of incapable persons. By connecting investment fundamentals to real-world fiduciary decision-making, this course empowers professionals to navigate their responsibilities with confidence and compliance. Registration is on a course-by-course basis. Find full details below!

[Investment Basics for Fiduciaries](#)

Connect With Us on LinkedIn

Join our online community and stay connected to your fellow practitioners and STEP Canada staff. We encourage all our members to be active and contribute through our corporate and individual branch/chapter groups. Our goal is to provide a forum for our members to explore their shared experience as trust and estate practitioners.

You can find the link to your local branch/chapter group on the STEP Canada corporate page.

Need help? View the [LinkedIn Cheat Sheet](#).

Searchable Resource Tool (SRT)

Reminder: As a benefit of STEP membership, you can easily search and access content from our library, including a collection of PDF versions of presentation decks, formal papers, additional resources, and articles from Branch/Chapter seminars, National Conferences, and Webcasts, as well as articles from STEP Inside.

Since its launch in March 2022 there have been more than 13,000 individual searches, with some of the most popular search terms being "digital assets", "cross-border", "insurance", "spousal trust", "estate freeze", and "wills".

The SRT has continued to grow with over 10 years' worth of content, including recent events such as the 2024-25 Branch Bundle seminars and the 2025 National Conference.

Members can access the SRT by logging into their MY STEP account.



[Login to MY STEP](#)

Reminders

STEP Canada staff work remotely and members are encouraged to communicate with us using email. Not sure who to write to? Send any inquiry to 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.

Click to [edit Email Preferences](#) or [Unsubscribe](#) from this list.

STEP Canada
45 Sheppard Avenue East
Suite 510
Toronto, ON M2N 5W9 - Canada
Telephone: 416-491-4949