

Hi {FIRST\_NAME|member}! With access to our monthly **STEP Insider**, you receive the latest news about upcoming CPD and networking events, practitioner opportunities, education updates, and more!

Newsletter Vol. 14 | Issue 5 | May 12, 2026

Looking to see what events are taking place this month? Scroll down!



[NEW STEP Canada Website](#)

[STEP Worldwide Member Directory](#)

[STEP Worldwide Website](#)

[Practitioner Opportunities](#)

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## STEP Membership Renewals for 2026-27

**Due Date: April 1st, 2026**

Haven't renewed your membership yet? Login to your MY STEP account today to get your membership back into good standing!

Renewing your membership maintains your access to exclusive STEP member benefits, including preferential rates for technical seminars and conferences, use of the prestigious TEP designation (if applicable), and access to your classroom (if applicable).

**Thank you to the over 86% of STEP Canada members who have already renewed their membership and confirmed their commitments for 2026-27.**



[Renew Your Membership Today](#)

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## Your Opinion Matters - Worldwide Member Survey

STEP is committed to giving you the very best member experience, and to do that, we need your help.

By taking just 10 minutes to complete STEP's member survey, you will help us better understand your needs, set our priorities, and improve the services delivered to you. Your feedback will directly influence our work.

The survey will close on **June 14, 2026**. For every survey completed, STEP will make a GBP1 donation to our charity partner, **Alzheimer's Disease International**.

Thank you in advance for sharing your opinions!



[Take The Survey](#)

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## STEP Canada's 28th National Conference

**Building Connections, Sharing Knowledge**

**SOLD OUT:** June 1-2, 2026 | In-Person, Toronto

**REGISTRATION OPEN:** June 8, 2026 | Online On-Demand Begins

Looking for a convenient and easy way to earn your CPD? Look no further! Starting June 8, you'll have on-demand access to all 19 conference sessions, so you can watch when it works best for you. Experience this year's exceptional program that will unpack current

developments, emerging trends, and practical strategies shaping the trust and estate landscape.

***"Excellent content and a great way to stay up to date on an annual basis."***



Please note that there will be no live online viewing during the in-person dates of the conference, on June 1-2.

[Register for Online On-Demand Access](#)

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## STEP National Webcast -

### ***CRA and STEP Canada: The New VDP (Voluntary Disclosures Program)***

**Thursday, June 18, 2026  
12:00 pm - 1:30pm ET**

STEP Canada and the CRA are jointly presenting a national webcast on the Voluntary Disclosures Program (VDP) updated policy, effective October 1, 2025.

This session will provide a practical overview of the VDP changes under Information Circular IC00-1R7, with a focus on how the program can help your clients to correct past tax errors or omissions.

This valuable webcast is offered free of charge for STEP Canada members & students, and will be presented in English.



[Register Today for the Webcast](#)

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## STEP Canada's National Awareness Campaign Globe & Mail Article

***"Canada's great wealth transfer drives demand for trust and estate specialists"***

*Advisors who hold the Trust and Estate Practitioner (TEP) designation provide expert guidance to Canadian families facing increasingly complex wealth and business transitions.*

*As Canadian families prepare to transfer unprecedented levels of wealth and privately held businesses to the next generation, advisors with specialized training are in high demand.*

*The Trust and Estate Practitioner (TEP) designation is a must-have credential."*



[Read the Complete Article Here](#)

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## Refreshed Marketing Brochures for Clients

As part of a new national campaign, STEP Canada is aiming to help Canadians identify and understand the TEP designation so they can make informed decisions with confidence.

These marketing brochures, updated in 2025, are designed for you to display in your office or provide to your clients in order to make complicated matters easier for them to understand. They are available only

to members of STEP Canada, and all members were sent a sample of each brochure with their physical member renewal kit.

For the cost of printing, only \$5 CAD for a pack of 10 brochures (+ tax and shipping), these brochures provide excellent value for promoting your specialized skillset and supporting clients.



[Learn More About Our Brochures](#)

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## 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.



**Hemal Balsara, TEP**  
Manulife Financial  
STEP Toronto

*"In order to appreciate my involvement – it's good to understand where I came from. I am an accountant who always had the desire to specialize and in tax and estate planning. I got my CA, and almost all of the most successful people in the tax and estate planning world had a TEP. As a result, I was super keen on getting my TEP and I ended up doing the essay route in a very short period of time. Very simply, getting the TEP was supposed to be the end game for me – get the letters, pay the fee, learn from the best practitioners and become a better practitioner myself – that's it.*

*Somewhere along the way – I started sharing the benefits of the TEP to other people in my network and they started getting their TEP's too. Ted Polci, who was on the Toronto Board, reached out to me regarding volunteering on the newly established membership committee. I was hesitant at first – at that point my wife and I had two young kids and the day job was very demanding. Regardless, I couldn't say no to Ted, not because he was persuasive, but rather I had that gut feel that good things will happen. Month after month the committee worked hard to increase and set record numbers in the Toronto branch – not only were we successful, we were having fun doing it!*

*This was my gateway into volunteering in the TEP world. As I got to know people on the Toronto branch, I felt more engaged, which in turn led to more opportunities to help out. I became the treasurer of the Toronto board, and now I'm deputy chair. I also got asked to volunteer for the National Conference committee (and now I'm deputy chair here too). I also have received many opportunities to speak at both the branch level and at the National Conference too. The point is all of this didn't happen overnight – rather it's a culmination of helping out over the years.*

*For me the reason why I like volunteering is I sincerely like the people who I team with, I get an opportunity to meet so many more great people and I get to learn. This has been an incredibly unexpected journey for me. I would encourage anybody who's sitting on the fence to volunteer to simply do something small and see where life takes you. All of our journeys are going to be unique. The reality is you can't walk a mile without taking that first step, but once you take that first step it's amazing too see what happens. I'm going to leave you with one question, what's your first step going to look like?"*

**Hemal is currently Deputy Chair and Member Services Officer for STEP Toronto; Deputy Chair of the 2026 National Conference Program Committee; and a contributing member of the STEP Canada Member Services Committee. He has also presented at local branch seminars and national conferences, and been a contributing author to 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](mailto:memberservices@step.ca).**

[Learn More About Volunteering With STEP Canada](#)

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## 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.

Available positions:

[Senior Lawyer - Dickson Appell LLP \(Toronto, ON\)](#)



[Learn More](#)

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## 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. [Visit the FAQ section](#) on our website to learn more about CPD accreditation for STEP Canada's events.



If you have questions relating to your CPD certificates or would like more information, please email [memberservices@step.ca](mailto:memberservices@step.ca).

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## STEP Canada National Webcasts - Available On-Demand

Registration is still available for the two recent STEP Canada National Webcasts:

- **2025 Federal Budget Webcast**
- **Beyond the Indian Act: A Primer on Estates, Succession, Tax and Trusts for Indigenous Clients**

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.



[Get Access to These Webcasts Today](#)

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## Upcoming Events Across the Country

**Registration Now Open**

**STEP Winnipeg**  
May 13, 2026  
12:00pm - 1:00pm CT  
*Members Only*

[TEP Talk](#)

**STEP Vancouver**  
June 10, 2026  
5:30pm - 8:30pm PT  
*Social Event*

[Social Event](#)

**STEP Southwestern Ontario**  
May 14, 2026  
12:00pm - 1:00pm ET  
*Members Only*

[TEP Talk](#)

**STEP Montreal**  
June 11, 2026  
12:00pm - 2:00pm ET  
*Passport Study Session*

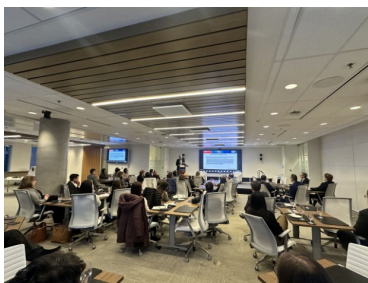
[Summary of the National Conference](#)

**STEP Canada**  
May 28, 2026  
1:00pm - 1:30pm ET  
*Full Members Only*

[Annual General Meeting](#)

**STEP Winnipeg**  
June 11, 2026  
6:00pm - 10:00pm CT  
*Student Networking Event*

[Winnipeg Goldeyes vs. Cleburne Railroaders](#)



**Branch Bundle registrants will have access to online on-demand replays (where applicable) until December 31, 2026.**

[View All 2025-26 Seminars & Events](#)

## Education Centre

Education Program	Exam/Essay Date	Registration Deadline
<b>CETA 1-4</b>	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
<b>NEW: Investment Basics for Fiduciaries (IB) 1-4</b>	Assessments are available on-demand. Final course assessment must be taken within 12 months from enrollment.	Registration is open on a rolling basis.
<b>STEP Canada Diploma Program (All Courses)</b>	November 2, 2026	September 1, 2026
<b>NEW FOR FULL MEMBERS: Taxation of Trusts &amp; Estates (Standalone course)</b>	November 2, 2026	September 1, 2026
<b>Essay Submission</b>	May 1, 2026	<a href="#">2026 topics can be found here</a>

### Education Program Updates

#### Reminder to students who are writing the May exam:

The following documents are posted under the EXAM section of your classroom, please read them carefully and familiarize yourself with the exam administration process and procedures.

- System Demo for exam
- Google Chrome extension to download
- Exam Procedures and Instructions
- Exam & Demo – Step-by-Step Instructions
- Exam Outline
- Provisional registration form
- Post exam important information

**Reminder:** there is a virtual Exam Procedures Drop-In Session held on Thursday, May 14th from 12noon-2pm ET should you have questions pertaining to the exam process. The link to attend is on your classroom.

**Good luck to all students writing the upcoming exam!**

### 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](mailto:education@step.ca).

### 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. [Read our brochure to learn more.](#)

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## 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.



Follow STEP Canada

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

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

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## 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](mailto: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.

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