



Welcome to the STEP Canada Insider

With access to the monthly STEP Insider, readers receive the latest news about the STEP organization, branch and chapter activity, national event updates, current practitioner opportunities, education information, and more!

Next Scheduled Branch & Chapter Events

[Click here](#) to discover the newly published 2019-20 regional branch and chapter events.



Practitioner Opportunities

Visit our [online job board](#) any day of the week for the most up-to-date job postings.

[Director, Wealth Strategist - CIBC, Montreal, QC](#)

[Team Leader, High Net Worth Strategy Consultation Team - Edward Jones, Mississauga, ON](#)

[Trust Officer - Scotiabank, Toronto, ON](#)

[Director, Tax and Estate Planning - Mackenzie Investments, Toronto, ON](#)

STEP Canada's Practitioner Opportunities service is a great resource for practitioners in the trust and estate industry who are seeking new professional ventures, and offers employers the chance to connect with

Education Center

Exam Sittings & Essay Intake Dates

Education Program	Exam/Essay Dates
CETA (English & French)	September 16, 2019
Assessment by Exam - Diploma Program (English & French)	November 4, 2019
Assessment by Essay	October 1, 2019 May 1, 2020

French Education Initiatives

The French Civil Law diploma program is open for registration for the November 4, 2019 exam; the registration deadline is October 4, 2019. The first exam sitting for CETA 1 (French) - Cours de base en administration de successions et de fiducies will be September 16, 2019; the registration deadline is August 16, 2019. For more

qualified people. STEP members receive a discounted rate to post on our [job board](#).

We offer 30-day job postings, which can be viewed 24 hours a day, 7 days a week. The STEP Canada [website](#) receives more than 3,500 visits per month, and traffic is driven to the [Practitioner Opportunities page](#) via our monthly e-newsletter, the STEP Insider, which is shared with our membership of over 2,700 potential candidates. To learn more about this service, please [click here](#).

Visit our online job board today!



www.step.ca/opportunity

Learn More

New Look for www.step.ca!

STEP Canada has never been stronger! We are pleased to report we have now grown to over 2,700 members since our beginning in 1998. Our members are important to us and the reason we strive for excellence in all we provide. Many of you have likely already had the opportunity to experience the new [STEP Canada site](#) and we encourage those who haven't to take some time and familiarize yourself with the new design, we hope you are all as excited as we are and find it easy to navigate. As always, we are here to guide you through the process should you have any questions - memberservices@step.ca or (416) 491-4949 x221.



information regarding our French programs and registration, please visit step.ca/fr or email education@step.ca

Certificate in Estate and Trust Administration (CETA)

STEP Canada's new online learning centre is now live! Students can access the course by signing in at step.ca and clicking "STEP Learning Centre". If you do not see this in your account and you are registered for an upcoming exam, please email education@step.ca. The next exam sitting for CETA (English) courses will be September 16, 2019; the registration deadline is August 16, 2019. It is recommended that you register in advance of this deadline to ensure sufficient preparation time. Please send all CETA program inquiries to education@step.ca.

Assessment by Exam (Diploma Program)

STEP Canada's new online learning centre for both the French and English programming is now live! Students that have already registered for courses prior to the launch of our online platform have now been transferred into their respective e-classrooms and should have received an email with instructions on how to access the STEP Learning Centre. To access the e-classroom for your course you must sign in at step.ca and click "STEP Learning Centre". If you are registered for an upcoming exam and do not see this option in your step.ca account, please email education@step.ca. The next exam date will be November 4, 2019, the registration deadline is October 4, 2019.

Exams will be taken online in the new online learning centre, **there are no longer exam reporting centres**. Information about exams can be found in the online learning centre inside the e-classroom for your course.

Assessment by Essay

The next essay submission dates are October 1, 2019 and May 1, 2020. The essay submission process has changed and students must now submit essays through the online STEP Learning Centre. To submit an essay, students must log in at step.ca and purchase an "essay submission". Students will then receive access to the online learning centre and further instruction on essay submission.

Mentorship Program & Study Groups

STEP Canada's Volunteer Mentorship Program is grounded in STEP's ongoing mandate to advance practitioner knowledge. If you are able to dedicate two hours per month to help groom and foster relationships with our next generation of STEP members, please reach out to our education team at education@step.ca.

Contact Education



21ST NATIONAL CONFERENCE

JUNE 6-7, 2019

METRO TORONTO CONVENTION CENTRE



STEP Canada / CRA - Final Questions & Answers from the 2019 Roundtable!

STEP Canada recently distributed the final questions and answers from the highly anticipated STEP Canada / CRA Roundtable session! All members should have received an email that included a pdf download. STEP Canada, along side all of our committees, aims to present engaging and relevant industry content. A copy of the questions and answers is available by logging into your [STEP Canada member portal](#) or via the [News & STEP Insider](#) section of [step.ca](#).



Stay Connected!

STEP Canada is actively working towards growing its presence on social media! Over the coming months you will see an increase in activity on both the public facing corporate LinkedIn page and branch/chapter level groups. Our initiative is to better utilize these channels to aid in releasing up-to-date information on events, **STEP** and **STEP members** in the media, public policy initiatives, membership benefits, and more!

Below you will find a direct link to STEP Canada's corporate LinkedIn page. We encourage our members to share content with their networks. You can find direct links to all STEP Branch & Chapter Group pages on each of the [Branch/Chapter Programs and Seminars](#) page.



2019-20 Branch Passport Sales

Branch passports for the 2019-20 educational season are open for purchase! All members have been notified of this offer (where applicable) by email. We encourage everyone to take advantage of this incredible opportunity. Preliminary programming for the 2019-20 educational season is also now available and may be found together with branch passport information through accessing your [Branch/Chapter Programs and Seminars](#) page.

2019-20 Membership Renewals

Annual membership fees were due as of April 1st, 2019. **All members with outstanding fees have now been suspended as of August 9, 2019.** Suspension letters have been mailed and use of the TEP designation has been revoked until member fees are remitted. If you are unsure if you have been suspended, please contact member services at memberservices@step.ca or 416-491-4949 x221.

STEP Canada continues to deliver opportunities of unparalleled education, representation and networking to its members. We look forward to another successful year and thank you for your continued support.



Finalists Announced

Seen as a hallmark of quality within the private client industry, we are incredibly excited to reveal the Canadian finalists for the **14th Annual STEP Private Client Awards**. Winners will be announced at the awards celebration on September 25, 2019 in London, England. More information on these awards and ticket purchase may be found at www.steppca.org.

These prestigious awards are open globally to both STEP members and non-members and recognize the excellence among private solicitors, lawyers, accountants, barristers, bankers, trust managers and financial advisors. It's a proud time for **STEP Canada** as we announce the following finalists. Join us in wishing each of them the best of luck!



Boutique Firm of the Year



Charity Team of the Year



International Legal Team of the Year



Investment Team of the Year



Private Client Legal Team of the Year

2019-20 Branch & Chapter Events

We are pleased to be able to offer a glimpse of our 2019-20 Education Seminars & Events.
Please see hyperlinks below for additional information.

Winnipeg Branch

Tuesday, September 10
*Estate & Trust Planning or Administration
with International Executors/Trustees &
Beneficiaries*

Toronto Branch

Wednesday, September 11
Case Law and Legal Update

Saskatchewan Chapter

Thursday, September 12
*Vulnerable Investors: Dealing with
Diminished Mental Capacity and Elder
Abuse*

Edmonton Branch

Thursday, September 19
*Sex, Lies and Canada/US Tax Issues:
An Update on US Tax Issues in Canadian
Estate Planning*

Montreal Branch

Thursday, September 19
*The Troubles with Life Interest Trusts as
Will Substitutes*

Calgary Branch

Wednesday, September 25
TOSI and Structuring Update

Atlantic Branch

Thursday, September 26
National Conference Round Up

Okanagan Chapter

2019-20 Preliminary Program

Ottawa Branch

2019-20 Preliminary Program

Southwestern Ontario Chapter

2019-20 Preliminary Program

Vancouver Branch

2019-20 Preliminary Program

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