



*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!*

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**22nd National Conference 2020
STEP/CRA Round Table Question Collection**

SAVE THE DATE!

*STEP Canada's 22nd National Conference is scheduled for:
Thursday, June 11th – Friday, June 12th, 2020*

The STEP/CRA Round Table Committee invites all STEP Canada members to submit questions for consideration. If selected, your question(s) will be presented at the **highly anticipated round table session.**

[Submit A Question](#)

Stay Connected!

STEP Canada is actively working towards growing its presence on social media!

Our network is growing! Please follow the link to STEP Canada's corporate LinkedIn page where you can find direct links to all STEP Branch & Chapter Group pages! We encourage you, our members, to share your successes, questions and industry insight on each [Branch/Chapter page](#).



Family Enterprise Advisor (FEA) Program Special Offer for STEP Members

The Family Enterprise Advisory Program is the only program designed to help advisors augment their formidable technical skills and showcase their commitment to Family Enterprises. Create deeper relationships with family enterprise clients with the FEA program. For more information, and testimonials, [click here!](#)



Be fluent in family enterprise.

To learn more, please contact Tim Mohr: tmohr@family-enterprise-xchange.com
1-866-849-0099 ext. 225 | family-enterprise-xchange.com

Introducing a New Designation! MFA-P

Offered by CAGP in collaboration with the Knowledge Bureau and Spire Philanthropy: Master Financial Advisor-Philanthropy! The MFA-P, provides specialized professional credentials to enable high-value philanthropic planning for individual and family legacies. Learn to have fruitful discussions, address big fears, and plan for solutions. To learn more, please review the brochure here.

Let's connect: www.knowledgebureau.com
1-866-953 4769 | registrar@knowledgebureau.com



Congratulations O'Sullivan Estate Lawyers! 14th Annual STEP Private Client Awards

We are excited to announce **O'Sullivan Estate Lawyers LLP** as the winners of **Boutique Firm of the Year** at the **14th Annual STEP Private Client Awards!** We would also like to extend a very warm congratulations to all those who participated, and to all the fellow winners and nominees. These prestigious annual awards recognize the excellence among private solicitors, lawyers, accountants, barristers, bankers, trust managers and financial advisors.



CAREER CENTRE

Visit our online job board any day of the week for the most up-to-date job postings.

Seeking new professional ventures? STEP Canada is proud to offer a Practitioner Opportunity service as a great resource for connecting the highest calibre of trust and estate practitioners to employers.

We offer 30-day job postings on step.ca (3,500+ visits each month!) and inclusion within our monthly e-newsletter: *STEP Insider* – which is shared with over 2,700 of our members! Our valued STEP members and their firms are encouraged to utilize a member only discounted rate to post openings on our job board.

More on Practitioner Opportunities
[Post an Opportunity](#)

Director, Tax Services & Special Products –
CIBC, Toronto, ON

Trust Officer – TD Wealth,
Windsor, ON

**Wealth Planning Consultant (Estate Planning
Lawyer)** – CI Investments, Winnipeg, MB

EDUCATION CENTRE

Exam Sittings & Essay Intake Dates

Education Program	Exam/Essay Dates	Registration Deadlines
CETA (English & French)	March 2, 2020	February 2, 2020
Assessment by Exam – Diploma Program (English & French)	November 4, 2019 May 25, 2020	<i>CLOSED</i> April 25, 2020
Assessment by Essay	May 1, 2020	–

It is recommended that you register in advance of this deadline to ensure sufficient preparation time.

Certificate in Estate and Trust Administration (CETA)

STEP Canada's new online learning centre is now live!

Students can access their course by signing in at step.ca and selecting: "STEP Learning Centre". If you are unable to find "STEP Learning Centre" within your step.ca account and are registered for an upcoming exam, please contact our Education Department below.

[Contact Education](#)
[More on CETA](#)

Assessment by Exam (Diploma Program)

STEP Canada's new online learning centre for both the French (Civil Law) and English (Common Law) programming is now live!

To access the course e-classrooms, you must sign in at step.ca and select: "STEP Learning Centre". If you are already registered for an upcoming exam and do not see this option in your step.ca account, please contact our Education Department below.

All exams will be taken online within 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.

[Contact Education](#)
[More on Assessment by Exam \(Diploma Program\)](#)

Assessment by Essay

Our essay submission process has recently changed.

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 additional instructions on essay submission.

[Contact Education](#)
[More on Assessment by Essay](#)

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 below.

[Contact Education](#)

BRANCH EVENT CENTRE

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

**Tues
Oct
15**

Winnipeg Branch

Planning, Drafting, and the Family Trust Agreement

**Wed
Oct
16**

Southwestern Ontario Chapter

Insurance Planning in the Current Tax and Estate Planning Environment

**Thurs
Oct
17**

Montreal Branch

Designations of Beneficiary and Rights of Survivorship in Quebec and Elsewhere in Canada (Seminar)

**Thurs
Oct
24**

Atlantic Branch

TOSI Two Years Later: What Have We Learned and Where Are We Now?

**Tues
Oct
29**

Calgary Branch

Powers of Attorney – Best Practices So That POA's Will Be Respected and What to Do When Third Parties Won't Accept Your POA

**Thurs
Nov
07**

Vancouver Branch

Ten Ethical Dilemmas

**Wed
Oct
16**

Ottawa Branch

Slay in Your Lane: Providing Optimal Client Service While Keeping Professional Boundaries in Check

**Wed
Oct
16**

Toronto Branch

Private Corporation Tax Planning and Inbound Structuring

**Tues
Oct
22**

Okanagan Chapter

Life Insurance – Estate and Investment Planning

**Thurs
Oct
24**

Edmonton Branch

Collaboration in the Estate Planning Process: A Round Table Discussion on Advisor Best Practices

**Wed
Nov
06**

Saskatchewan Chapter

When Estate Planning and Valuation Issues Collide: How Do I Value My Client's Life Work?

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Got Questions? Please Contact Us | Phone: 416-491-4949 ext.221 | Toll-free: 1-877-991-4949 | step.ca

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