



## 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.

[Tax and Estate Planning Manager - Empire Life, Montreal, QC \(English\) \(French\)](#)

[Senior Financial Planner - Richardson GMP, Toronto, ON](#)

[Senior Financial Planner - Richardson GMP, Calgary, AB](#)

[Trust Officer - Scotiabank, Montreal, QC](#)

[Wealth Planning Consultant \(Estate Planning Lawyer\) - CI Investments Inc., Winnipeg, MB](#)

[Trust Officer - TD Wealth, Windsor, ON](#)

STEP Canada's Practitioner Opportunities service is a great resource for practitioners in the trust and estate

## Education Center

### Exam Sitings & Essay Intake Dates

Education Program	Exam/Essay Dates
CETA (English & French)	September 16, 2019 March 2, 2020
Assessment by Exam - Diploma Program (English & French)	November 4, 2019 May 25, 2020
Assessment by Essay	October 1, 2019 May 1, 2020

### 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](mailto:education@step.ca). The deadline for the March 2, 2020 exam sitting is February 2, 2020. It is recommended that you register in advance of this deadline

industry who are seeking new professional ventures, and offers employers the chance to connect with 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!



[step.ca/opportunity](http://step.ca/opportunity)

Learn More

New Look for [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](mailto:memberservices@step.ca) or (416) 491-4949 x221.



to ensure sufficient preparation time. Please send all CETA program inquiries to [education@step.ca](mailto:education@step.ca).

### 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 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](mailto:education@step.ca). The next exam date will be November 4, 2019, the registration deadline is October 4, 2019. The following exam date is May 25, 2020; the registration deadline is April 25, 2020. It is recommended that you register in advance of this deadline to ensure sufficient preparation time.

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

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

Contact Education



### 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. STEP Canada will be posting sharable content for each branch/chapter seminar/event that is open to both members and non-members. We encourage all our members; especially our branch/chapter executives, to like and/or share these posts with their networks as a means of extending our reach. **Stay connected with your Branch/Chapter**, STEP Canada will also post regional and member only content to each of our LinkedIn Groups. Direct links to each of the Branch/Chapter LinkedIn Groups can be found through accessing the appropriate [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.



**Winners Announced in 14 Days!**

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](http://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.

### 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*

### Ottawa Branch

Wednesday, September 18  
*Cover Your Assets: Evaluating Risk and Fair Market Value for Transfers and Other Dispositions of Assets*

### 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*

### Vancouver Branch

Thursday, October 3  
*The Problems with Kids*

### Winnipeg Branch

Tuesday, October 15  
*Tips & Traps for Drafting the Family Trust*

### Southwestern Ontario Chapter

Wednesday, October 16  
*Insurance Planning in the Current Tax and Estate Planning Environment*

### Okanagan Chapter

Tuesday, October 22  
*The Nuts and Bolts of Insurance*

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