

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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2021-22 Membership Renewals



If you haven't renewed already, this is a friendly reminder to submit payment at your earliest convenience.

Membership renewal fees were due on April 1, 2021.

Renewing your membership with STEP Canada will allow your continued use of the TEP designation (if applicable) and grant you multiple membership benefits such as access to member-only resource guides, charts, and publications, discounts on continuing education events, representation from STEP, and much more.

Attending the virtual 23rd National Conference? In order to receive the preferred pricing for members in good standing, membership dues must be paid in full prior to the first broadcast.

Please submit payment through the STEP Canada website by logging into your profile here:

[Click here to login](#)

STEP continues to deliver an unparalleled level of education, representation and networking opportunities and looks forward to another successful year together!

STEP Canada National Webcast

STEP Canada's Public Policy Committee Presents

The New Corporate Registry Rules in Canada: Beneficial Ownership, Trusts and Transparency

Date: Friday, May 7th, 2021

Time: 12:00 PM - 1:00 PM EDT

Cost: Complimentary to STEP Members, \$140.00 for Non-Members

Language: English

Join moderator [Catherine Brown](#) and speakers [Daniel Frajman](#), [Peter Glowacki](#), and [John Riches](#) for this important technical webcast. Our distinguished panel will discuss the goals of the rules (including combatting tax evasion and promotion of good faith generally through transparency) and their application (including their application to discretionary and other trusts).

This is a must attend event for anyone whose work touches upon corporations or trusts.

[Details and Registration](#)

23rd National Conference

What are you waiting for? Register now for this not-to-be-missed event!

The countdown has begun to the 23rd National Conference with only two months to go until STEP Canada kicks off its most anticipated event of the year! This year's conference features two days of technical sessions and offers up to 9.00 hours of substantive CPD. We welcome more than 40 highly regarded speakers from across Canada, the United States, and overseas, who will share their expertise on the latest trends and developments from the trust and estate industry.

In addition to all of the diverse and in-depth technical content, delegates can also look forward to joining their fellow practitioners for a virtual 'social event' on Monday, June 14th.

We hope to 'see' you there!

[Details and Registration](#)

2021 Q1 & Q2 Branch/Chapter Bundles

Thank you to all who have joined us so far for the presentations included in the 2021 Q1 & Q2 Branch/Chapter Bundles! We have been thrilled to receive such positive feedback from our delegates. The January, February, and March seminars have been archived and can be found on the app, available for you to view at any time.

Haven't registered yet? It's not too late! Register now to access all previous sessions (including presentation materials and chat room transcripts) in the Branch Bundle App, along with the remaining two sessions still to be broadcast.

Coming up next:

The May session will be a presentation brought to you by your local Branch/Chapter and will be a topic specific to your region. Follow the link below to find out what your local Branch/Chapter is presenting in May.

[Details and Registration](#)

2020 Speakers' Series - CE/CPD Credits

Supplementary certificates have now been emailed to delegates that viewed the session(s) and successfully pass the required quiz between March 1, 2021 and March 30, 2021. If you did not receive your CE/CPD certificate, or you believe your certificate is missing credits for session(s) that you have attended, please contact [Member Services](#).

For delegates that have not completed the series or did not pass the required quiz, the archived broadcasts will remain on the app for your viewing and all quizzes will remain active. STEP Canada will be sending out supplementary CE/CPD certificates on a monthly basis moving forward.

[Details and Registration](#)

STEP Private Client Awards

The deadline to submit your entry for the 16th Annual STEP Private Client Awards is fast approaching.

Don't miss out, submit your entry for the STEP Private Client Awards by **April 23, 2021**. Open globally, these prestigious Awards recognize and celebrate excellence among private client solicitors, lawyers, accountants, bankers, trust managers and financial advisors.

Winners will be announced at the Awards Ceremony on September 23rd, 2021.

[Click here to view previous winners](#)

[Click here for more information](#)

Globe & Mail Feature

On Thursday, April 8th, STEP Canada was featured in The Globe & Mail with an article and ad highlighting the critical role that Trust and Estate Practitioners play in family business succession planning. The detailed article interviewed two STEP members, Pam Prior and William Fowles, who shared their expertise on the topic.

[Click here to read the article](#)

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.

- [Will & Estate Consultant - RBC Wealth Management \(Vancouver, Lower Mainland, Fraser Valley\)](#)
- [Senior Trust Officer - Scotia Wealth Management \(Toronto\)](#)

Have questions?

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

Education Centre

Exam Sittings & Essay Submission Dates

Education Program	Exam/Essay Dates	Registration Deadlines
CETA 1	Accessible at any time	Exams must be completed within 6 months of registration
CETA 2-4 (English & French)	June 1, 2021 September 1, 2021	May 1, 2021 August 1, 2021
STEP Diploma Program (English & French)	May 31, 2021 November 1, 2021	April 30, 2021 October 1, 2021
Essay Submission	May 1, 2021* October 1, 2021*	-

**2021 topics have been updated and can be found [here](#)*

Notice from the Education Team

Diploma and CETA Students:

The online exam procedures will be changing. STEP will be introducing a new online exam platform to deliver a better test-taking experience for our students. Keep an eye out for an announcement regarding an informational webinar.

Diploma Students:

STEP Education is pleased to offer an interactive seminars for our Law of Trusts, Taxation of Trusts & Estates and the Wills, Trust & Estate Administration courses. Please check your email (including spam folders) and the course website for information.

CETA Students:

CETA marks from the March 1, 2021 exam have been posted to the “MY STEP” accounts and can be found under “My courses & registrations”. Enrollment into the subsequent courses is now open.

Upcoming Branch & Chapter Events

Register early to save your spot.

Wed April 14	STEP Toronto STEPping out to Lunch <i>Zoom</i>	Fri April 23	STEP Ottawa TEP Talk <i>Zoom</i>
Wed May 5	STEP Toronto Annual Branch Meeting <i>Zoom</i>	Thurs May 6	STEP Ottawa Student Study Group <i>Zoom</i>
Thurs May 6	STEP Calgary Annual Branch Meeting & TEP Talk <i>Zoom</i>	Fri May 7	STEP Vancouver Annual Branch Meeting <i>Zoom</i>
Fri May 7	STEP Montreal Annual Branch Meeting <i>Zoom</i>	Mon May 10	STEP Calgary Student Study Group <i>Zoom</i>

Reminders

All **STEP Canada staff** are working from home until further notice. 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.

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[Got Questions? Please Contact Us | Phone: 416-491-4949 ext.221 | Toll-free: 1-877-991-4949 | \[step.ca\]\(http://step.ca\)](#)

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