

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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Founder's Awards

Founder's Awards



STEP Canada is thrilled to congratulate the Canadian recipients of the STEP Founder's Awards for 2021, **Rachel Blumenfeld** and **Richard Niedermayer**.

The Founder's Awards for Outstanding Achievement commemorate George Tasker, the founder of STEP, and are for those volunteers who have made 'an exceptional and outstanding contribution to the Society above and beyond that normally expected of a member through office in their branch or elsewhere in the voluntary life of the Society'.

Please join us on congratulating Rachel and Richard on this well-deserved honour.

2021 Q1 & Q2 Branch/Chapter Bundles

It's not too late! Registration is well underway for the 2021 Q1 & Q2 Branch/Chapter Bundles and we would love for you to join us.

The January seminar from your Branch/Chapter has now been archived and will remain on the app available for you to view, so you won't miss any of the action. We understand that with busy schedules it can be hard to commit to viewing a seminar at a specific date and time, with the Branch/Chapter Bundle app, you don't have to! Take advantage of the freedom that comes with choosing your own broadcast schedule by either watching the original broadcast at the indicated date and time, or viewing the archived version at your leisure. A copy of the original chat room transcript and presentation materials are published in the app alongside the archived broadcast.

Coming up next:

**STEP Canada National Seminar
February 18, 2021**

Tax Update: What the 2020 Election Means for Estate Planning; Compliance Issues and Relief Programs Arising from the Pandemic; and Trust Audits

To view more details and to register for your local Branch/Chapter Bundle, click the link below!

[Details and Registration](#)

23rd National Conference

STEP Canada's must-attend event is once again open for registration!

This year's not-to-be-missed event will take place from June 14-15 and will feature more than 40 top speakers from across Canada, the United States, and overseas who will discuss the latest trends and developments in wealth management. Also included is the exclusive and robust STEP Canada native conference app that will deliver all session broadcasts, presentations, and papers; and a NON-traditional 'delegate kit' that will be physically sent to the first **550 delegates that register**.

Like the Speakers' Series, all sessions will be pre-recorded, and during the original broadcast delegates can engage with the expert speakers in the session's online chat room. A transcript of the chat room will be available on the app within 24 hours of the original broadcast for those who prefer the on-demand option.

Register before **February 28th** to receive the early bird rate! **Don't miss out on this fantastic event.**

[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 December 8, 2020 and January 29, 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 read the information below carefully before contacting Member Services.

Reminder: In order to receive CE/CPD credits, delegates are required to complete the quiz after viewing the original/archived broadcast session(s). Once you have submitted your quiz results, you will receive a confirmation email notifying you of the completion of the quiz along with your quiz results and this will be proof of your attendance. This quiz is located at the bottom of the session broadcast page, underneath the video. If you did not receive a confirmation email, we do not have record that you attended the session and would not have issued a certificate.

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 16th Annual STEP Private Client Awards are now open for entries!

Don't miss out! Entries for the 2021/2022 STEP Private Client Awards are now open and will close on **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](#)



[More Information](#)

Resources for STEP Members

STEP Canada members can access all resources below in their My STEP portal under the resources box after logging on to step.ca.

STEP Canada's Finding Financial Security in Difficult Times - Freezing & Refreezing Guide
STEP Canada Tax Technical Committee

STEP Canada is pleased to deliver to its valued members the STEP Canada Guide to Finding Financial Security in Difficult Times - Freezing & Refreezing. The guide is effective as of October 15, 2020.

STEP Canada's TOSI Guide - 2.2nd Edition

STEP Canada Tax Technical Committee

The updated consolidated edition of the STEP Canada Guide to the Tax on Split Income (TOSI) Rules incorporates two recent CRA TOSI technical interpretations dated January 10, 2020 and April 8, 2020, and is effective as of October 1, 2020.

STEP Canada - Canada Revenue Agency Round Table Questions & Answers

STEP Canada Tax Technical Committee & STEP Canada National Conference/ Fall 2020 Speakers Series Committee

The final 2020 STEP Canada - Canada Revenue Agency Round Table Questions & Answers are now available to STEP Canada members and Speakers' Series attendees.

Executing Estate Documents in Canada in 2021:

Covid-19 Amendments and How to Effect Safe (And Valid) Signings

From the STEP Canada Trust & Estate Technical Committee

STEP Canada has prepared a resources chart for its members to reference the options for having documents signed in each province and territory. This guide is effective as of January 2, 2021.

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.

Are you seeking a new professional venture? Here are our current postings:

Tax and Estate Planner - Manulife Private Wealth (Toronto/Vancouver)

Vice-President, Advanced Wealth Planning - Wellington-Altus Private Wealth (Calgary/Vancouver)

Senior Wealth Planner - Wellington-Altus Private Wealth (BC/AB/SK/MB)

Manager, Taxation - Scotia Wealth Management (Montreal)

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 <i>(English & French)</i>	March 1, 2021 June 1, 2021	February 1, 2021 May 1, 2021
STEP Diploma Program <i>(English & French)</i>	May 31, 2021 November 1, 2021	April 30, 2021 October 2, 2021
Essay Submission	May 1, 2021* October 1, 2021*	-

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

Notice from the Education Team

Notice to students in the Trust & Estate Planning course: The course material has been revised and posted on the course website. There is no material difference in the updated content that will affect your examination – students can study from either version of the course manual. All program and course inquiries should be directed to our Education team at education@step.ca.

A reminder to our students that as a benefit of your membership you have access to the STEP Canada Mentorship Program to assist you with your course. To request a mentor from your local branch send an email to education@step.ca.

Upcoming TEP Talks

Register early to save your spot.

**capacity reached, waitlist available*

Wed
Feb 10

STEP Winnipeg
TEP Talk
Zoom

Wed
Feb 10

STEP Toronto*
STEPPing out to Lunch
Zoom

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

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STEP Canada
45 Sheppard Avenue East
Suite 510
Toronto, Ontario M2N 5W9
CA