



E-Newsletter Vol. 10 • Issue 7 • July 19, 2022

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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### 24TH NATIONAL CONFERENCE

STAY CONNECTED, STAY INFORMED.

VIRTUAL DELIVERY

JUNE 15, 2022 | Round Table

JUNE 16-17, 2022 | Conference Sessions



## 24th National Conference Archive Sessions Now Available

A record-breaking 959 delegates registered for this year's National Conference, tuning in from across the country for timely and technical presentations and two in-person networking opportunities. We would like to thank the 2022 National Conference Programming Committee, panelists, event staff, sponsors, and delegates, for making this year a success.

**All conference sessions have been archived and are now available for on-demand viewing. To watch or rewatch the session(s), please login to the 24th National Conference App.**

Registration is still open to those that would like to take advantage of these in-depth technical sessions and their applicable CE/CPD opportunities.

[Click here to register](#)

# 17th Annual STEP Private Client Awards Finalists Announced

We are thrilled to recognize the eight outstanding Canadian finalists for the 17th Annual STEP Private Client Awards in the following seven categories.

Congratulations to:

**TD Wealth Private Trust, Tax Services**  
Accountancy Team of the Year (midsize firm)

**Your Digital Undertaker®**  
Digital Assets Practice of the Year

**NIKA LAW LLP**  
**RBC Wealth Management, Royal Trust**  
*Employer of the Year*

**KPMG Private Enterprise**  
*Family Business Advisory Practice of the Year*

**KPMG Family Office**  
*Multi-Family Office Team of the Year*

**Whaley Estate Litigation (WEL) Partners**  
*Vulnerable Client Advisory Practice of the Year*

**Lesley Donsky TEP, RBC Royal Trust**  
*Young Practitioner of the Year*

The winners will be announced in-person at the ceremony on September 14, 2022. [Book your table here.](#)

The STEP Private Client Awards are seen as the hallmark of quality within the private client industry. Open globally to both STEP members and non-members, these prestigious Awards recognize and celebrate excellence.



## Searchable Resource Tool (SRT)

Have you checked out STEP Canada's **new** Searchable Resource Tool?

As a member, you now have access to a library of STEP Canada content including a collection of presentation decks, formal papers, additional resources, and articles from Branch & Chapter Events, National Conferences and Webcasts, and the STEP Inside newsletter.

[Access the STEP Canada SRT today by logging in to your MY STEP account.](#)

## Coming Soon: 2022-23 Branch/Chapter Bundles

All STEP Canada branches and chapters will once again be offering a Bundle of 6 unique technical seminars for the 2022-23 programming season. This seasons Bundle will follow a hybrid model, with branches/chapters having the option to host their local sessions in-person if government directives allow. After 48-hours the session will then be available for online on-demand viewing. The six seminars included in the Bundle will deliver in-depth technical content providing excellent value and continuing education (CE/CPD) opportunities.

The two National sessions will be broadcast for online viewing only, taking place on **Wednesday, September 14th, 2022 at 12:00 noon ET** and **Thursday, January 19th, 2023 at 12:00 noon ET**.

Stay tuned for more additional details, registration, and sponsorship opportunities which will be released in mid-August.

## CE/CPD Credits for Past Events

CPD certificates for the 2021-22 Branch Bundle sessions will be sent by the end of July 2022. Members who have not yet taken the quiz for any sessions they have viewed can still do so to receive their CPD credits.

CPD certificates for the 24th National Conference will be sent in August 2022.

If you have concerns regarding your credits, please email [memberservices@step.ca](mailto:memberservices@step.ca).

**Access to all apps including the 2020 Speakers' Series, 2021 Q1 & Q2 Branch Bundles, 2021 National Conference, 2021-22 Branch Bundles, and 2022 National Conference will only be available until December 31, 2022.**

## 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.

**Estate Paralegal - Campbell Froh May & Rice LLP (Richmond, BC)**

**Estate & Trust Specialist - Servus Credit Union (Calgary, AB)**

**Senior Accountant, Tax - RLB LLP (Ontario)**

**Tax Manager - RLB LLP (Ontario)**

**Senior Estate & Trust Administrator - Wyth Trust (Saskatoon, SK)**

**Estate Manager, Gifts & Estate Planning - BC Children's Hospital Foundation (Vancouver, BC)**

**Senior Trust & Estate Consultant - CIBC Trust Corporation (Quebec)**

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	September 1, 2022 March 1, 2023	August 1, 2022 February 1, 2023
STEP Canada Diploma Program	November 7, 2022 May 29, 2023	September 7, 2022 March 29, 2023
Essay Submission	October 1, 2022 May 1, 2023	<b>*2022 topics can be found <a href="#">here</a></b> (new topics will be released in January 2023)

### Updates

**STEP Canada is pleased to announce the launch of our new mentorship program!**

With the addition of new learning resources and networking opportunities built into our diploma program, we have re-evaluated our mentorship program to ensure that STEP continues to offer a valuable experience to

our members.

Our new mentorship program is focused on **career enhancement** and will aim to facilitate a relationship where knowledge and experience are shared between mentors and mentees that work in the same industry.

If you would like more information about becoming a mentor or a mentee, please email [education@step.ca](mailto:education@step.ca).

### Diploma Program

All grades from the spring term were posted on July 4th, please check your MY STEP account under "My Courses & Marks" to view your grade and register for the next course. **Reminder:** The diploma course fees are increasing to \$995 as of August 1, 2022. Register in advance of this date to receive the current rate of \$895.

**Certificates:** Program completion certificates for both the Diploma Program and CETA will be mailed out to all those that have finished a STEP Canada education program between 2020 and the most recent term. The preferred address in your STEP Canada profile will be used. Please ensure this is up to date by logging in to your MY STEP account at [step.ca](http://step.ca) and editing your profile information.

## Connect With Us

### Have you connected with us on LinkedIn?

Join our online community and stay connected to your fellow practitioners and STEP Canada staff. We encourage all our members to be active and contribute through our corporate and individual branch/chapter groups. Our goal is to provide a forum for our members to explore their shared experience as trust and estate practitioners.

Follow [STEP Canada's corporate page](#).

You can find the link to your local branch/chapter group on the STEP Canada corporate page.

Need help? View the [LinkedIn Cheat Sheet](#).



## 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](mailto: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.

### [Quick Links](#)

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**[STEP Member Directory](#)**

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