

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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23rd National Conference App



ATTENTION REGISTERED NATIONAL CONFERENCE DELEGATES!

With less than one week to go until we kick off the highly anticipated 23rd National Conference, we are thrilled to announce the launch of the robust conference app!

Over the next few days, all presentation materials will be uploaded into the app. We encourage delegates to login and view/download the presentation materials in advance to get the most out of each session.

Any questions or concerns can be directed to [Member Services](#).

For those not registered, it's not too late!

[Register here.](#)

**STEP Canada encourages all delegates to login to the app early to ensure they have no technical issues. Our office will be able to provide quicker assistance to all before the morning of June 14th.*

Family Enterprise Advisor (FEA) Program

The **Family Enterprise Advisor (FEA) Program** augments your technical skills with a more nuanced level of understanding around business families and their unique challenges. The **Fall 2021 Virtual Cohort** starts September 23/24. The virtual classroom is live, instructor-led, engaging and interactive, and allows for easy participation. STEP Members receive a 10% discount. For more information or to get the inside scoop from a certified TEP, FEA, contact Tim Mohr at tmohr@familyenterprise.ca.



"The FEA program taught me how to serve my clients with greater impact. I now start by asking more thought provoking questions. . . It consistently unearthed more considerations that lead to better and more meaningful solutions – not just from a financial perspective, but outcomes that serve the family for the better."

Sloan Levett CPA, CA, CFP, TEP, FEA
Fuller Landau Family Office Services Inc.

Membership Renewals

The due date for 2021-2022 membership renewals was April 1, 2021.

If you have not yet renewed your membership, please do so as soon as possible. Renewing your membership with STEP Canada grants 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.

Failure to renew your STEP Canada membership will result in the revocation of your TEP designation (if applicable) and all membership benefits.

Please submit payment through the STEP Canada website by logging into your profile here:
[Click here to login](#)

2021 Q1 & Q2 Branch/Chapter Bundles

Thank you to all who joined us for the 2021 Q1 & Q2 Branch/Chapter Bundles!

The final presentation took place on June 3rd, 2021, wrapping up the Bundles with a bonus French seminar. The archived broadcasts are available now for all seminars. Please refer back to the Branch/Chapter Bundle App for the broadcast link, presentation materials, and Q&A chat room transcript.

We are currently seeking accreditation where necessary and compiling all quiz results from all sessions and will be sending out CPD certificates in July.

We look forward to seeing everyone again for the 2021-2022 Branch/Chapter Bundles beginning in September! For a sneak peak of the upcoming broadcast dates, [please click here](#).

Registration will be opening in August 2021.

Share the Benefit of STEP

Did you know?

STEP represents over 22,000 members Worldwide and over 2,900 members in Canada, and is the leading international organization for trust and estate professionals who specialize in family inheritance and succession planning. The TEP designation is an internationally recognized hallmark of professional expertise, and we are always welcoming new members to join!

If you have a colleague you think would be interested in, or benefit from STEP membership, you can share [this brochure](#) with them and invite them to contact our Member Services team at memberservices@step.ca for more information on how to join.

You can find more information on our website, [here](#).



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 & Trust Advisor - MD Financial Management \(MD Private Trust\), Calgary](#)

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)	September 1, 2021 March 1, 2022	August 1, 2021 February 1, 2022
STEP Diploma Program (English & French)	November 1, 2021 May 30, 2022	October 1, 2021 April 30, 2022
Essay Submission	October 1, 2021* May 1, 2022	-

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

Notice from the Education Team

Diploma and CETA Students:

Marks for the May 31st diploma exams and the June 1st CETA exams will be published on the student accounts under "My Courses & Marks" on July 5th, 2021. Provisional registration is available if students wish to gain access to their next courses ahead of receiving their grade. Email education@step.ca and request the provisional registration form if you wish to take advantage of this opportunity.

Essay Program Students:

Marks will be inside of the essay submission portal for the May 1st intake on June 15th, 2021.

Reminder: All program/course inquiries should be directed to education@step.ca.

Upcoming Branch & Chapter Events

Register early to save your spot.

Wed
June 9

STEP Winnipeg
TEP Talk
Zoom

Thurs
June 10

STEP Canada
Annual General Meeting
Zoom

[Click here to view the upcoming schedule for the 2021-2022 Branch/Chapter Bundle seminars.](#)

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 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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