

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



It's time to renew your STEP membership!

Renewing your membership with STEP Canada will allow your continued use of the TEP designation (if applicable) and grant you many membership benefits such as discounts on programming, access to member-only publications and resources, representation from STEP, and much more.

All members are required to pay their membership dues and sign the annual member declaration by April 1, 2021.

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 Milestone Reached

We are pleased to announce that our fully designated TEP member count has exceeded 2,000!

With over 950 student members currently studying in STEP Canada education programs, we anticipate this number will continue to grow. We would like to extend a big thank you to our students, TEPs, and supporting employers who see the enormous value in STEP education and membership.



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The January and February seminars have been archived and will remain on the app available for you to view, so you won't miss any of the action.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 March 24, 2021

Conflict of Laws in Estate Planning: An Estate Planning Case Study + an Estate Administration Case Study; Each Intertwining Three Different Jurisdictions

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**. Register soon - there are only a few kits left!

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.

[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 January 29, 2021 and February 28, 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 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](#)

[Click here for more information](#)

eNews Updates

February 22, 2021

RE: STEP Canada Submission on Repealing the Ontario Estate Administration Tax

[Click here for more information](#)

February 24, 2021

RE: Ontario Small Estate Limit and Bond Requirement for Small Estate Applications

[Click here for more information](#)

March 5, 2021

RE: Calmusky v. Calmusky 2020 ONSC 1506

[Click here for more information](#)

Globe & Mail Feature

On Friday, February 19th, STEP Canada was featured in The Globe & Mail with an article and ad highlighting the importance of leaving a legacy. The insightful article interviewed two prominent STEP members, Corina Weigl and Glenn Stephens, who shared their expertise on the significance of putting your estate in order.

[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.

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

[Executive Trust Officer / Trust Officer - TD Private Wealth \(Vancouver\)](#)

[Associate Lawyers - Trust, Estate Administration & Estate Planning - Legacy Tax + Trust Lawyers \(Vancouver\)](#)

[Senior Trust Solutions Advisor - Concentra Trust \(Toronto\)](#)

[Trust Administrator - Solus Trust \(Vancouver\)](#)

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 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

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 Branch & Chapter Events

Register early to save your spot.
**capacity reached, waitlist available*

Wed Mar 10	STEP Winnipeg TEP Talk Zoom	Wed Mar 10	STEP Toronto* <i>STEPping out to Lunch</i> Zoom
Fri Mar 12	STEP Ottawa TEP Talk Zoom	Wed Mar 17	STEP Saskatchewan Annual Chapter Meeting 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