

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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Q1 & Q2 2021 Branch Bundles



STEP Canada continues to find ways to provide its dedicated members and delegates with continuing education opportunities in our rapidly changing environment. For Q1 and Q2 of 2021, STEP Canada will be transforming its regular branch and chapter in-person seminar programming into an online delivery option.

Each of STEP Canada's eleven branches and chapters will offer its local delegates a "Branch/Chapter Bundle" of excellent seminars tailored to the interest of each region. The Bundle will consist of four online seminars; one each in January, February, March, and May; plus a complimentary 5th seminar in French. The January and May seminars will be unique to each branch/chapter, while the February and March seminars will be national offerings.

Thank you to the program sub-committee; to the program officers in our 11 branches and chapters for the wonderful collaboration; and to our speakers and moderators who have agreed to prepare these excellent presentations. We look forward to offering this exciting opportunity to members and delegates across the country.

Watch your inbox in the next few weeks for more details and registration!

STEP Web Event

Upcoming Thought Leadership Seminar

Join Moderator Mark Dunkley TEP, Shakespeare Martineau LLP, UK, and Canadian speakers Carol Lynde and Adam Wiseman, Bridgehouse Asset Managers, Canada, for a webinar as part of the Thought Leadership Series hosted by STEP Web Events!

Title: Mental Health and the Financial Advice Relationship

Date: November 18, 2020

Time: 4:30 - 5:30 PM GMT (11:30 AM - 12:30 PM EST)

Description: Mental health has become a matter of increasing public concern worldwide. In Canada, by age 40, half of the population will have, or will have had, a mental illness. How do you, as an advisor, detect a crisis early on when managing your client relationships? Using insights gained from research, advisor interviews and mental health expertise, this presentation will give an overview of the current mental health landscape and its impact on investors, providing advisors with a suite of educational tools and real life scenarios that you can apply with your clients who may be experiencing mental health issues.

[Click here for more details and registration.](#)

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](#).



2020 Speakers' Series - It's Not Too Late



STEP Canada's Fall 2020 Speakers' Series has so far amassed over 775 delegates from all across the country, who are networking and engaging in real time through our virtual Speakers' Series app while watching 22 amazing technical sessions.

All broadcasts have been archived to ensure you have access to every session, no matter when you register. The broadcasts will be available indefinitely on our App, so delegates will have access to this fantastic resource for years to come, including the Q&A transcripts for each session.

Join us today by registering for the 2020 Speakers' Series!

Register today!

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 provides access to the highest caliber of trust and estate practitioners including lawyers, accountants, financial planners, insurance advisors and trust professionals. Our members are located all over Canada!

We offer 30-day job postings, which can be viewed 24 hours a day, 7 days a week on our website. STEP member firms receive discounted rates.

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

Director, Estate Planning - BMO Private Wealth, Vancouver

Vice President, Advanced Wealth Planning - Wellington-Altus Private Wealth, Remote

Senior Wealth Planner - Wellington-Altus Private Wealth, Toronto

Senior Trust Officer - RBC Wealth Management, Calgary

Client Tax Manager - MD Financial Management, Flex Location (across Canada)

Have questions?

**More on Practitioner Opportunities
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)	March 1, 2021 June 1, 2021	February 1, 2021 May 1, 2021
STEP Diploma Program (English & French)	May 31, 2021 November 2, 2021	April 30, 2021 October 2, 2021
Essay Submission	May 1, 2021* October 1, 2021	-

**2021 topics will be posted in mid-November 2020*

Notice from the Education Team

Marks for the diploma exams that took place on November 2, 2020 will be posted inside of the "My Courses & Marks" section of the MY STEP Portal at www.step.ca. Grades are released by course as soon as they become available. All grades will be released by December 7, 2020. If you wish to register early for your next course before receiving your grade, please send an email request to education@step.ca with the subject line "Provisional Course Registration".

A reminder for students that have completed their last exam in the diploma program: In order to obtain your TEP designation, you must complete the "Upgrade Application" form that is inside of your course website (WETA/TEPL). All program and course inquiries should be directed to our Education team at education@step.ca.

Branch & Chapter Event Centre

Registration is open for our TEP Talks! Register early to save your spot for your local branch/chapters next TEP Talk.

**Capacity reached; waitlist available*

Fri Nov 13	STEP Ottawa TEP Talk <i>Zoom</i>	Fri Nov 13	STEP Edmonton TEP Talk <i>Zoom</i>
Mon Nov 16	STEP Okanagan TEP Talk <i>Zoom</i>	Tues Nov 17	STEP Southwestern Ontario TEP Talk <i>Zoom</i>
Wed Nov 18	STEP Atlantic TEP Talk <i>Zoom</i>	Wed Nov 18	STEP Winnipeg TEP Talk <i>Zoom</i>
Wed Nov 18	*STEP Toronto TEP Talk <i>Zoom</i>	Mon Nov 23	STEP Saskatchewan TEP Talk <i>Zoom</i>
Wed Nov 25	STEP Calgary TEP Talk <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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