



eNews – March 5, 2021
STEP Canada Public Policy Committee

RE: Calmusky v. Calmusky 2020 ONSC 1506

On February 22, 2021, the Public Policy Committee of STEP Canada sent a [letter to the Assistant Deputy Minister, Financial Services Policy at the Ontario Ministry of Finance](#). The letter was in support of concerns raised in a [CALU/Advocis joint letter dated September 16, 2020](#), addressed to the same recipient. The CALU/Advocis joint letter expressed the need for legislative amendments to address the unpleasant and significant effects of the recent decision regarding beneficiary designations in the Calmusky v. Calmusky case. In this case, a specific beneficiary designation was ignored by the courts due to insufficient proof of the testator's intent.

Public Policy Committee
STEP Canada

About STEP: The Society of Trust and Estate Practitioners is the leading international organization for trust and estates professionals. Headquartered in London, England, it has more than 22,000 members worldwide in 95 countries.

STEP Canada, founded in 1998, has over 3,000 members with branches in the following cities and regions: Atlantic, Montreal, Ottawa, Toronto, Winnipeg, Calgary, Edmonton, Vancouver and chapters in Okanagan Valley, Saskatchewan, and Southwestern Ontario. STEP is a multi-disciplinary organization with the most experienced and senior practitioners in the field, including: lawyers, accountants, financial planners, insurance advisors and trust professionals. They provide domestic and international advice on trust and estates, including planning, administration and related taxes.

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