



eNews – July 17, 2018

STEP Canada Tax Technical Committee / National Conference Committee

RE: Final Questions & Answers from the 2018 STEP Canada / CRA Roundtable

On May 28-29, 2018, STEP Canada held its 20th National Conference at the Metro Toronto Convention Centre in downtown Toronto. The extremely successful two-day event was attended by a record-breaking 788 trust and estate practitioners.

One of the many highlights from the national conference is the annual STEP Canada / CRA Roundtable. During this session, senior representatives from the CRA answer questions prepared by trust and estate professionals regarding cases and issues of concern to both practitioners and their clients.

STEP Canada would like to thank the following panel participants for their contributions preparing and presenting this year's roundtable session:

Michael Cadesky, FCPA, FCA, FTIHK, CTA, TEP, Toronto: Cadesky Tax

Kim G.C. Moody, FCA, TEP, Calgary: Moodys Gartner Tax Law LLP

Steve Fron, CPA, CA, TEP, Oshawa: Manager, Trusts Section, Income Tax Rulings Directorate, Canada Revenue Agency

Phil Kohnen, CPA, CMA, TEP, Ottawa: Manager, Trusts Section, Income Tax Rulings Directorate, Canada Revenue Agency

Christine Van Cauwenberghe, LLB, CFP, RRC, TEP, Winnipeg: Investors Group; Treasurer, STEP Canada

We are pleased to deliver the final 2018 roundtable questions & answers to STEP Canada members and conference attendees. Please click the link below to access the PDF document.

[STEP Canada / CRA Roundtable Questions & Answers 2018](#)

STEP Canada national committees work closely and cooperatively with the Canada Revenue Agency to maintain a relationship that benefits our valued members and conference delegates.

STEP Canada Tax Technical Committee
STEP Canada National Conference Committee

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 20,000 members worldwide in 95 countries.

STEP Canada, founded in 1998, has 2,600 members with branches in the following cities and regions: Atlantic, Montreal, Ottawa, Toronto, Winnipeg, Calgary, Edmonton, Vancouver and chapters in London & Southwestern Ontario, Okanagan Valley and Saskatchewan. 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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