



eNews – July 20, 2016

STEP Canada Tax Technical Committee / National Conference Committee

RE: Final Questions & Answers of 2016 STEP Canada / CRA Round Table

On June 9-10, 2016 STEP Canada held its 18th National Conference in Toronto. The extremely successful two-day conference was attended by a record 700+ trust and estate practitioners.

One of the many highlights of the conference is the annual STEP Canada / CRA Round Table session. Senior representatives from the CRA answered questions prepared by trust and estate practitioners about cases and issues that are of concern to both practitioners and their clients.

On behalf of STEP Canada, thanks go to the following panel participants for their contributions to prepare and present the session:

Michael Cadesky, FCPA, FCA, FTHK, TEP, Toronto: Cadesky and Associates LLP

Paul LeBreux, LLM, TEP, Toronto: Globacor Tax Advisors

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

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

Marina Panourgias, CPA, CA, TEP, Toronto: Canada Revenue Agency, Senior Rulings Officer, Trust Section II, Income Tax Rulings Directorate

STEP Canada is pleased to deliver the final questions & answers of the 2016 round table to its members and conference attendees. Please [follow this link](#) to access the PDF document.

The national committees of STEP Canada strive to work closely with the Canada Revenue Agency to maintain our cooperative relationship that benefits our valued members.

Tax Technical Committee/National Conference Committee,
STEP Canada

About STEP Canada:

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 2,300 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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