

STEP Canada Insider

E-Newsletter Vol. 3
Issue 3 March 10, 2015



Welcome to the STEP Canada Insider!

With access to the monthly STEP Insider, readers will receive the latest news about branch activity, national conference updates, practitioner opportunities, education, and more!

Next Scheduled Branch/Chapter Events

[Click here to see YOUR next regional branch event](#)



Practitioner Opportunities

STEP Canada's Practitioner Opportunities offers an electronic recruitment resource for the trust and estate industry. We are offering this service to all STEP members at discounted rates!

[Inside Sales Representative – Legacy Private Trust, Toronto](#)

[Account Executive - Legacy Private Trust, Toronto](#)

[Will and Estate Planner, TD Bank, Edmonton](#)

[Content Development Associate, Wills, Trusts & Estates – LexisNexis Canada, Markham](#)

Education Center

Qualified Practitioner Route: The next submission date for QP essays is May 1, 2015. For topics and guidelines, please click [here](#)

Diploma Route: May 25, 2015 is the next exam sitting. Exam locations and further details will be sent out towards the end of April. Students registered for the next exam sitting of Diploma 4, Trust and Estate Planning, are reminded that their first assignment is due no later than midnight on March 15, 2015.

CETA1: All chapters and self-assessment quizzes have been uploaded to the learning environment. A system testing area will be available by the end of March to review your

[Vice President, Wealth Planning – CI Investments, Toronto](#)

[Learn More](#)

computer's compatibility with the online proctoring requirements, in preparation for your online exam on May 25, 2015. The Quebec Civil Code version of CETA1 will be available for enrollment in June 2015.

CETA2: Advanced Topics of Estate and Trust Administration (common law) will be published and open for registration in June 2015 with examination on November 23, 2015.

[Contact Education](#)

STEP Canada Survey Update - Estate and POA Survey

By Kathleen Cunningham TEP, Chair, Trust and Estate Technical Committee

In November/December 2014 STEP Canada conducted a survey about the experiences of its members when dealing with financial institutions in regards to Estates and Powers of Attorney.

Thank you to the 297 STEP Canada members and their colleagues who responded. Every jurisdiction and every professional group within STEP Canada was well represented.

The survey sought to better understand the nature of the issues and challenges experienced by our members, their staff, and their clients in respect to the following:

- Obtaining estate information for a personal representative
- Releasing funds and assets to a personal representative
- Acceptance of a valid enduring/continuing power of attorney document
- Acceptance of instructions from attorneys with authority to make decisions under a valid enduring/continuing power of attorney
- Whether or not STEP Canada should attempt to address the issues and challenges identified in the survey, and if so, whether or not to give priority to estate administration or enduring/continuing powers of attorney.

Your feedback has provided valuable information and we are in the process of summarizing the findings in order to provide a more detailed report to members. Importantly, 79% of respondents agreed that STEP Canada should take steps to address the issues identified. Only 3% were opposed. 18% had no opinion. As a result, our next report to members will also include further details on how STEP Canada is responding to the findings in order to address the concerns identified.

Preliminary Program available for 17th National Conference

The Preliminary Program for the 17th National Conference taking place **Thursday, June 18 - Friday, June 19** at the Metro Toronto Convention Centre is now posted on the [STEP website](#). The final program will be released this **Wednesday March 11**. The STEP Canada conference has established itself as a must-attend event for domestic and international practitioners offering unsurpassed networking and continuing education opportunities. For details and registration, please click [here](#). Early-bird registration offers a \$100 savings before March 31. [Watch this video](#) to hear more from our 2014 attendees!

Membership Renewal and Profile Update

Membership renewal letters for the 2015-16 year have been sent out via Canada Post. Payment is due before April 1, 2015 and can be made [online](#) or through the STEP Canada office.

We encourage you to maximize your membership profile by going to www.step.org the STEP Worldwide site, and adding details regarding your professional practice, education, and areas of specialization. This enhanced profile information is published annually in the *STEP Worldwide Directory and Yearbook* and makes you discoverable through the member and public search feature on step.org. Please call Minita Chandy at the STEP Canada office for assistance should you encounter any login difficulties.

Certificate in Estate and Trust Administration (CETA)

The first [CETA](#) Course: Foundations of Estate and Trust Administration remains open for registration. Students registering now will write their exams in November. A superior educational offering, our new CETA program is already the preferred learning program for 3 major trust companies.

Delivery of CETA is completely online through STEP Canada's new electronic learning environment. Going paperless, social media networking, receiving instant material updates, studying on the go, and writing exams online are some of the features that give students the flexibility and mobility that they've been asking for.

Click [here](#) to discover more about this new program, who it was created for, and to register. For additional inquiries, please contact education@step.ca

Upcoming Branch/Chapter Events

Winnipeg

March 17

[Powers of Appointment, Delegation of Will Making Power, Trust Beneficiary for purposes of Income Tax Act \(Canada\), Back-Dating of Trusts](#)

Calgary

March 18

[Legislative Update: Panel Discussion](#)

Edmonton

March 19

[Legislative Update: Panel Discussion](#)

Montreal

March 19

[Insurance – New Legislative Updates](#)

Ottawa

March 25

[How Executors and Powers of Attorney Can Deal Effectively with Financial Institutions](#)

Toronto

April 15

[The Transfer of Wealth Including the Family Cottage](#)

Vancouver

April 16

[WESA – One Year Later](#)

Saskatchewan

May 14

[Farm Succession Planning](#)

Atlantic

May 28

[Estate Planning: Tips and Traps \(followed by Annual Branch Meeting\)](#)

London & Southwestern Ontario

May 28

[TBA](#)

Okanagan

May TBA

[Return to Top](#)

Contact Us | Phone: 416-491-4949 ext.221 | www.step.ca