

## STEP Canada Insider

E-Newsletter Vol. 3  
Issue 2 February 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!

[Senior Litigator – Whaley Estate Litigation, Toronto](#)

[Trust Officer, BMO, Kelowna](#)

[Manager \(Senior Manager\), Tax Advisory – RBC, Toronto](#)

[Estate Planning Lawyer – CI Investments,](#)



#### Education Center

##### 2014 STUDENT PRIZE RECIPIENTS:

Congratulations to the following students who achieved academic excellence in 2014. These students will be featured in the May edition of STEP Inside.

**Highest Mark in Law of Trusts:** *Rebecca Turcotte, Ottawa branch*

**Highest Mark in Taxation of Trusts & Estates:** *Justin Hoffman, London & Southwestern Ontario chapter*

**Highest Mark in Wills, Trust & Estate**

[Toronto or Winnipeg](#)

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

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

[Learn More](#)

**Administration:** *Kenneth Keung, Calgary branch*

**Highest Mark in Trust & Estate Planning:** *Kenneth Keung, Calgary branch*

**Highest Mark in a Qualified Practitioner Essay:** *Robert Miedema, Atlantic branch*

**Gerald W. Owen Book Prize; Highest Overall Average across all 4 Diploma courses:** *Katy Basi, Toronto branch*

[Contact Education](#)

## 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](#). Please click [here](#) to view the exciting program that is in store for you. 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!

## Saskatchewan Chapter Launch Event Recap

On January 28 the newest regional chapter of STEP Canada was officially launched in Saskatchewan. Congratulations to the new executive committee: Beaty Beaubier; Shawn Baier; Crystal Taylor; Pina Melchionna; and Tony Banik for planning such a successful event for the 120 practitioners who attended. Jamie Golombek's presentation, "Tax Update 2015 – What you need to know!", was engaging and entertaining.



L-R: Christine Van Cauwenberghe, Tony Banik, Ian Worland, Michael Dodick, Beaty Beaubier, Crystal Taylor, Janis Armstrong, Shawn Baier



STEP Saskatchewan attendees during the education presentation

## Membership Renewal

Annual membership fees for the 2015-16 year are due April 1, 2015. Renewal letters will be sent via Canada Post early March, payments can be made online or through the STEP Canada office. STEP continues to deliver opportunities of unparalleled education, representation and networking.

## Certificate in Estate and Trust Administration (CETA)

The first [CETA](#) Course: Foundations of Estate and Trust Administration is open for registration. A superior educational offering, our new CETA program is already the preferred learning program for 4 major trust companies. CETA will be of value to both individuals who want to advance their careers and employers who want to seize the many business opportunities afforded by today's changing demographics.

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.

To ensure that students have enough time to prepare for the May 25, 2015 exam, the cut-off to register for Foundations is [February 13, 2015](#). Registrations received after this date will be scheduled for the November 23, 2015 exam sitting of Foundations.

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](mailto:education@step.ca)

## STEP NYSBA/STEP USA 11th Annual International Estate Planning Institute

The New York State Bar Association and the Society of Trust and Estate Practitioners are pleased to present the 11th Annual International Estate Planning Institute on March 12-13 at the Crowne Plaza Times Square, New York City, USA. The event includes a distinguished international panel assembled to exchange ideas and discuss developments in international estate planning. Please click [here](#) to see the agenda.

## Upcoming Branch/Chapter Events

Winnipeg

February 10

[US Issues](#)

Toronto

February 11

[Pilfering the Community Chest: High Stakes Monopoly for Seniors Financial Abuse: Detection and Intervention](#)

Calgary

February 18

[Insurance Planning Options and Shareholder Agreements](#)

Ottawa

February 18

[Capacity Issues in Ontario](#)

Montreal

February 19

[Philanthropy: Why, When and How](#)

Edmonton

February 26

[Farm Planning: What's New? Legacy or Loss?](#)

Vancouver

February 26

[Charitable Giving – The ITA Rules, Donation of Unique Assets and More](#)

Atlantic

March 5

[Selected Tax Planning Issues with Intervivos Trusts](#)

Okanagan

March TBA

[Alter-Ego and Joint Partner Trusts, Private Shares](#)

Saskatchewan

May 14

[Farm Succession Planning](#)

London & Southwestern Ontario

May 28

[TBA](#)

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