## **STEP Canada Insider**

E-Newsletter Vol. 3 Issue 3 April 14, 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**

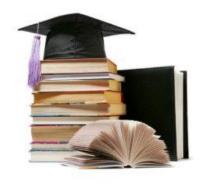
STEP Canada's Practitioner Opportunities offers an electronic recruitment resource for the trust and estate industry. We are offering this service to all STEP members at discounted rates!

<u>Director, Tax and Estate Planning – Investors</u> <u>Group, Alberta and Quebec</u>

<u>Inside Sales Representative – Legacy Private</u> <u>Trust, Toronto</u>

Account Executive – Legacy Private Trust, Toronto

Will and Estate Planner - TD Bank, Edmonton



#### **Education Center**

STEP Canada is pleased to announce a special student session has been added to the 2015 national conference program. The session, Administering an Estate, will take place from 3:50 pm to 5:05 pm (ET) on Thursday, June 18. This complimentary session will be webcast live and archived for future viewing, however local GTA students are encouraged to attend in-person; and once it is adjourned, also attend the annual student reception. Invitations to attend will be sent to students in our Diploma Program and Qualified Practitioner Program shortly, along with the session agenda. Don't miss your chance to participate in this national event, meet our subject matter experts, and ask questions!

**Learn More** 

A reminder to QP students that the next essay submission is fast approaching on **May**1st. Submissions can be sent via email to:

education@step.ca. Don't forget to go over the submission checklist before sending in your paper.

The next set of Diploma exams is scheduled for **Monday**, **May 25**, **2015**. Tutorial and exam locations details will be sent out soon.



#### Final Program available for 17th National Conference

The Final 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 <u>STEP website</u>. 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 <u>here</u>. <u>Watch this video</u> to hear more from our 2014 attendees!

## **Membership Renewal and Consent Forms**

Thank you to those who have remitted payment for their membership dues for the 2015-16 year. As part of Canada's anti-spam legislation, a consent form indiciating your subscription preferences has been included in both the paper and online renewal process. Please ensure that this form is filled out in order to continue to receive STEP communications. Payment can be made <u>online</u> or through the STEP Canada office.

## **STEP Atlantic Membership Event Recap**

The STEP Atlantic branch held a complimentary sparkling reception on February 5 for members and a small group of potential members. The event took place at the Art Gallery of Nova Scotia inside the Zwicker's Gallery where the 24 attendeess enjoyed the works of the late artist *Jacques Hurtubise* while connecting with local practitioners and learning more about STEP.



STEP Atlantic Networking Reception at the Zwicker's Gallery



L-R: Event Sponsor Harry Thompson: Cox & Palmer; STEP Atlantic Leadership: Erin O'Brien-Edwards, Peggy Gates-Hammond, Robbie Brown, Henry Visser, Andrée Godbout)

## **Certificate in Estate and Trust Administration (CETA)**

The first <u>CETA</u> 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 <u>here</u> to discover more about this new program, who it was created for, and to register. For additional inquiries, please contact <u>education@step.ca</u>

# **Upcoming Branch/Chapter Events**

Toronto

April 15

The Transfer of Wealth: What to do about the Family Cottage

Calgary

April 22

Challenges of an Ageing Population

Saskatchewan

May 14

Farm Succession Planning

Vancouver

April 16

WESA - One Year Later

Winnipeg

May 12

**Estate Administration and Digital Assets** 

Edmonton

May 14

Annual Branch Meeting and Wind Up Wine and Cheese – Year in Review

Montreal

May 14

Quebec Case Law on Wills, Estates and

**Trusts** 

Atlantic

May 28

Estate Planning: Tips and Traps (followed by Annual Branch Meeting)

Okanagan

May TBA

Alter-Ego and Joint Partner Trusts, Private

<u>Shares</u>

Ottawa

May 20

Wills, Formalities in Ontario, the rest of Canada and the rest of the Common Law

World

London & Southwestern Ontario

May 28 TBA

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