

STEP Canada Insider

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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!

[Director, Tax and Estate Planning – Investors Group, Alberta and Quebec](#)

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

[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.

[Contact Education](#)

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 [STEP website](#). 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](#). [Watch this video](#) 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 indicating 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 [online](#) 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 attendees 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 [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

<p>Toronto</p> <p>April 15</p> <p>The Transfer of Wealth: What to do about the Family Cottage</p>	<p>Vancouver</p> <p>April 16</p> <p>WESA – One Year Later</p>
<p>Calgary</p> <p>April 22</p> <p>Challenges of an Ageing Population</p>	<p>Winnipeg</p> <p>May 12</p> <p>Estate Administration and Digital Assets</p>
<p>Saskatchewan</p> <p>May 14</p> <p>Farm Succession Planning</p>	<p>Edmonton</p> <p>May 14</p> <p>Annual Branch Meeting and Wind Up Wine and Cheese – Year in Review</p>

Montreal

May 14

[Quebec Case Law on Wills, Estates and Trusts](#)

Ottawa

May 20

[Wills, Formalities in Ontario, the rest of Canada and the rest of the Common Law World](#)

Atlantic

May 28

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

London & Southwestern Ontario

May 28

[TBA](#)

Okanagan

May TBA

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

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