

STEP Canada Insider

E-Newsletter Vol. 2

Issue 12 December 9, 2014



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 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!

[Regional Vice President, Wealth Planning \(Tax and/or Estate Planning\) - CI Private Counsel, Calgary](#)

[Associate Director, Gift & Estate Planning - University of British Columbia, Vancouver](#)



Education Center

Happy December! Exam results will be sent to students as soon as they become available. We are aiming to have these delivered prior to the holidays or very shortly thereafter in early January.

School is officially in! The e-classroom for [CETA](#): Foundations of Estate and Trust Administration opened on November 14. Our new electronic learning environment provides flexibility with studying; students have the choice of

[Learn More](#)

reading the materials online, printing a paper copy, or pushing content to a mobile device. Connect with your fellow classmates through discussion boards, social media, or blogging.

[Contact Us](#)

STEP Canada Webcast: Legislative Proposals affecting Testamentary Trusts, Graduated Rate Estates, Charitable Donations on Death, and Qualified Disability Trusts

Originally broadcast November 14, Pamela Cross TEP, Lisa Heddema TEP, and Angela Ross used common client situations to illustrate some significant implications the Department of Finance's proposed legislation will have on planning. The panel discussed how these proposals will have broad implications for planning using spousal trusts, alter ego or joint partner trusts, multiple Wills, insurance trusts, the design of charitable gifts on death and planning for the disabled.

An online viewer commented: *'The case study examples were very helpful in illustrating the issues. The overall summary of the changes was also very beneficial. The speakers were very knowledgeable on the topic and provided excellent explanation'*

Access to the archived webcast can be purchased [here](#).

Certificate in Estate and Trust Administration (CETA)

The first [CETA](#) Course: Foundations of Estate and Trust Administration is now open! 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.

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

New STEP Logo

A new and exciting STEP logo will be implemented in the new year as part of STEP's rebranding process. The updated visual identity presents STEP as a credible, established and modern professional organization. Stay tuned!

STEP Canada Staff Holiday Give Back

The STEP Canada Staff is in the holiday spirit and will be volunteering on December 12 at the [Holiday Helpers](#), a registered charity whose mission is to provide a one-time personalized Christmas package to low income families with young children who are trying to improve their circumstances. The STEP staff will be helping to wrap and label the gifts for the families.

Please note that the STEP Canada office will be closed **December 24–26** and **December 31–January 1**. The STEP Canada Staff wishes all its members a safe and happy holiday!



2014 National Conference Dates

STEP Canada's 17th National Conference is scheduled for **Thursday and Friday, June 18–19, 2015** at the Metro Toronto Convention Centre. **SAVE THE DATES – REGISTRATION WILL OPEN SOON!**

Ottawa	Toronto
January 14 Cross Border Planning: Tax Traps and Mismatches	January 14 Guardianships: Dealing with Minors and Adults under Disability
Montreal	Calgary
January 15 Tax Potpourri	January 20 Planning for Foreign and Domestic Recreational Residences
Winnipeg	Edmonton

January 20

[Registered Education Savings Plans](#)

January 22

[Planning for Special Circumstances](#)

[Breaking Bad:](#)

[Trusts/Taxes/Philanthropy](#)

London & Southwestern Ontario

January 29

[Succession and Estate Planning for Farms and Small Businesses](#)

Vancouver

January 29

[2014 – The Year in Review and Wine & Cheese Reception](#)

Okanagan

January 30

[21-Year Planning](#)

Atlantic

March 5

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

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