

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 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!

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

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

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

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



Education Center

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 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](#)

[Senior Tax Consultant – MD Financial Management, Ottawa](#)

[Trust Officer – MD Financial Management, Ottawa](#)

[Learn More](#)

Happy New Year!

STEP Canada would like to wish all of our members Happy New Year! We look forward to continuing to promote our organization and the TEP designation to both the industry and public. We are always happy to hear from you and welcome any ideas, suggestions and concerns you may have.

Early Bird Registration opens for 17th National Conference

Registration is now open for STEP Canada's 17th National Conference taking place **Thursday, June 18 – Friday, June 19** at the Metro Toronto Convention Centre. The STEP Canada conference has established itself as a must-attend event for domestic and international practitioners offering unsurpassed networking and continuing education opportunities. Click [here](#) for details and registration. Preliminary Program is forthcoming. [Watch this video](#) to hear more from our 2014 attendees!

Saskatchewan Chapter Launch Event

Join STEP in celebrating the new Saskatchewan Chapter on Wednesday, January 28 at the Saskatoon Club from 2:45 pm – 5:00 pm. The event will include a networking reception and a technical presentation on "Tax Update 2015 – What you need to know!" by Jamie Golombek. Click [here](#) for full event details.

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

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.

Toronto

January 14

[Guardianships: Dealing with Minors and Adults Under Disability](#)

Ottawa

January 14

[Cross Border Planning: Tax Traps and Mismatches](#)

Montreal

January 15

[Tax Potpourri](#)

London & Southwestern Ontario

January 19

[Value Creation and Business Succession for Small Businesses and Farms](#)

Winnipeg

January 20

[Registered Education Savings Plans](#)

Calgary

January 20

[Planning for Foreign and Domestic Recreational Residences](#)

Edmonton

January 22

[Planning for Special Circumstances: Breaking Bad – Trusts/Taxes/Philanthropy](#)

Saskatchewan

January 28

[STEP Saskatchewan Chapter Launch and Networking Reception](#)

Vancouver

January 29

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

Okanagan

January 30

[21–Year Planning](#)

Atlantic

March 5

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

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