

STEP Canada Insider

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Issue 5 May 12, 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!

[Estate Planning Lawyer or Notary – CI Financial, Montreal](#)

[Trust Officer/Senior Trust Officer – Legacy Private Trust, Toronto](#)

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



Education Center

Qualified Practitioner essay results are expected back mid-June.

Good luck to all students who are writing Diploma exams on May 25, 2015! Exam results will be communicated towards the end of June, beginning of July.

A special complimentary student session is planned for Thursday June 18th at the National Conference. Students of the Diploma Program and the Qualified Practitioner Program are invited to attend in person or by webcast. Annual student awards reception will immediately follow technical session. Details below.

[Learn More](#)

[Contact
Education](#)

Final Program and Mobile App 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 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! For those who have registered, user names and passwords to access and download the 2015 conference app will be sent shortly.

Complimentary Student Session at National Conference

The Education Committee will be inviting all students to attend a special student session at the national conference, either in person or via webcast on Thursday afternoon. The panel, made up of senior practitioners and an award-winning student, will address the following subject: **“You’ve Just Been Named Executor: Now What, STEP by STEP?”** The presentation will highlight the content of all four diploma courses and its application to estate administration, start to finish. Immediately after this session, students will be invited to attend the student reception, where our top-scoring students in each course will be presented with their achievement awards. The award recipients are featured in the May 2015 issue of *STEP Inside*. Congratulations to each of them.

Registration for the conference is **not required**. Please click [here](#) to login, see more details and to confirm your attendance.

Branch & Chapter Business

Over the next few weeks all STEP Canada regional branches and chapters will be holding their annual meetings. For applicable regions, elections for new regional executives and officers will take place; and the winner of the branch or chapter "volunteer of the year award" will be announced.

STEP USA National Conference

The inaugural STEP USA Conference is presented by STEP USA and STEP Los Angeles. The conference will take place **Thursday, June 4 - Friday, June 5** in San Diego at the waterfront hotel, Hilton San Diego Bayfront. The full program will include the latest issues on international private client planning. For more information on this event, please click [here](#).

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. Current CETA1 students will be writing their online exams on **May 25, 2015**. Registration for CETA2 will open at the beginning of June.

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

Winnipeg

May 12

[Estate Administration and Digital Assets followed by Annual Branch Meeting](#)

Edmonton

May 14

[Annual Branch Meeting and Wind Up Wine and Cheese – Year in Review](#)

Ottawa

May 20

[Annual Branch Meeting and 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](#)

Vancouver

May 28

[Annual Branch Meeting and Post Mortem Planning](#)

Montreal

May 14

[Annual Manual Branch Meeting and Common Pitfalls – from the point of view of the administrator of the property of others / Recent Quebec Case Law on Wills, Trusts and Estates](#)

May 26

[Capital Benoit Inc.: Bâtitseur de valeurs familiales: Joint Conference between STEP Montreal and the CFA Quebec \(event to be held in Quebec City\)](#)

May 28

[Topical Canadian and US Tax Issues on Trusts and Estates](#)

Toronto

May 13

[Annual Branch Meeting and Elder Care: A Practical Approach](#)

Saskatchewan

May 14

[Annual Chapter Meeting and Farm Succession Planning](#)

Calgary

May 27

[Annual Branch Meeting and What's New in the Zoo? Panel Update](#)

London & Southwestern Ontario

May 28

[Working with the Estate Administration Tax Act and An Update on Recent Joint Property Case Law](#)

Okanagan

June 4

[Insurance Basics and Hot Topics followed by Annual Chapter Meeting](#)

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