

STEP Canada Insider

E-Newsletter Vol. 2 Issue 11 November 11, 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!

STEP Canada WEBCAST:

Friday, November 14, 2014: 12 noon – 1:00 pm ET

Legislative Proposals affecting Testamentary Trusts, Graduated Rate Estates, Charitable Donations on Death and Qualified Disability Trusts.

To register for this webcast and for more details, please visit step.ca

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

Senior Wills, Trusts, and Estates Lawyer – Cox & Palmer, Halifax

Education Center



The classroom doors open to CETA Course 1: Foundations of Estate and Trust Administration on November 14! To register, please visit step.ca.

Good luck to all students writing exams at the end of this month.

Victoria Chapter Development Meeting

The Victoria region has been identified as an ideal area to establish a regional chapter of STEP Canada. A chapter development meeting is scheduled for **Thursday, November 20** at 8:45 am at Grant Thornton LLP located on the 3rd Floor of 888 Fort Street, Victoria. With over 25 current STEP members in this region, research indicates there is potential for significant growth and non-member support. Members of regional chapters remain affiliated with their original branches and their educational offerings, in this case STEP Vancouver.

Certificate in Estate and Trust Administration (CETA)

On November 14, the online classroom doors open for the first CETA Course: Foundations of Estate and Trust Administration. A superior educational offering, 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.

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 Industry Events where you'll find STEP Exhibiting

November 19 – FPSC's [2014 Financial Planning Week Symposium](#) at the Arcadian Court, Toronto

November 21 – FPSC's [2014 Financial Planning Week Symposium](#) at the Pan Pacific, Vancouver

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!**

Toronto

November 12
Estate Trustees: Do You Really Want
the Job?

Calgary

November 19
Family Dynamics in Estate Planning

Ottawa

November 12 (rescheduled from
October 22)
A review of Alter Ego Trusts, Charitable
Remainder Trust and Joint Partner
Trusts

November 19
What Ontario Practitioners Need to
Know about Quebec Wills and Estates

Atlantic

November 20
Planning for Domestic and Foreign
Vacation Residences

Edmonton

November 20
US Immigration and Tax Rules: Why
and What of US Ties

Montreal

November 20
Panel Discussion – Trust and Estate
Topics relating to both Tax and Civil
Law, including 2014 Budget Issues

Winnipeg

November 25
Family Office

Vancouver

November 27
The Business of Divorce

Okanagan

December 3
Tax and Succession Planning
Considerations for BC Farmers,
Ranchers and Orchardists – Part II

London & Southwestern Ontario

January 29
Succession and Estate Planning for
Farms and Small Businesses

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