

## STEP Canada Insider

E-Newsletter Vol. 4  
Issue 4 - April 12, 2016



### Welcome to the STEP Canada Insider

With access to the monthly STEP Insider, readers will receive the latest news about the STEP organization, branch/chapter activity, national conference updates, current practitioner opportunities, education information, and more!

### Next Scheduled Branch/Chapter Events

[Click here](#) to see the next regional branch/chapter event nearest YOU.

### Career Advertising with STEP Canada

Present your job advertisement to our membership of over 2,300 qualified potential candidates. Advertising with STEP Canada's [Practitioner Opportunities Service](#) offers a highly cost-effective, quick, and simple way to attract the right people. Our practitioners are distinguished by their specialized skillset, have earned or are working toward the TEP designation, and are the most sought-after in the field. We offer 30-day job postings, which can be viewed 24 hours a day, 7 days a week on our [website](#) (more than 3,500 visits per month), and are highlighted once a month in the STEP Insider.

**Now you can extend your reach!** Upgrade your package to include a 30-day listing on STEP Worldwide's [website](#), which receives over 50,000 visits monthly, and additional traffic through STEP's twice weekly News Digests (12,000+ international subscribers) and weekly Jobs Update emails (2,500+ job-seeker subscribers). STEP Canada advertisers receive a **50% discount** when posting to STEP Worldwide's Jobs Board. For more information on available packages and pricing, please [click here](#).



## Practitioner Opportunities

Visit our [online job board](#) any day of the week for the most up-to-date job postings.

### Current Opportunities

[Consultant, Estates Solutions Centre – CIBC, Toronto](#)

[Estate & Trust Advisor – TD, Calgary](#)

[Executive Trust Officer/Trust Officer – TD Wealth Management, Vancouver](#)

[Personal Tax & Estates Associate – Goodmans LLP, Toronto](#)

[Trust Officer, Charitable Foundation Services – Scotiabank, Toronto](#)

[Vice-President & Regional Director, Trust Services, Eastern Canada – BMO Private Banking, Montreal](#)

[Wills & Estates Law Clerk – Beard Winter Lawyers LLP, Toronto](#)

[Learn More](#)

## Education Center

### Certificate in Estate and Trust Administration (CETA)

The third course of the CETA program, CETA3 was launched late last month. Students who have successfully completed CETA2 can now register for CETA3 and prepare to write the exam on September 19, 2016. The next exam date for CETA1 and CETA2 students is scheduled for May 30th (online exam). [Contact](#) our Education Coordinator for more information.

### Diploma Program Route

Assignment #2 is due on April 28th for those enrolled in the Trust and Estate Planning course (mandatory for May exam students). The next exam date is scheduled for May 30th (paper-based exam).

### Qualified Practitioner Route

The next submission date for essays is May 1, 2016. Revised [essay topics](#) have been published and are in effect for the May 1 submission onwards. If you are submitting an essay, please ensure you have reviewed [essay guidelines](#) and have prepared the required forms and fees to submit along with your essay.

[Contact Education](#)

## 18th National Conference - June 9-10, 2016

The National 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. To hear from our 2015 attendees, watch this [video](#) highlighting our 17th National Conference.



**Final Program now available!** The [Final Program](#) is now available on the STEP Canada [website](#), outlining the many sessions that will be taking place during the conference.

### **Continuing Education Credits**

Stay informed on CPD accreditation for this year's National Conference. We've already received CE approval from a number of organizations. [Click here](#) for more information.

## **A Big STEP Thank You to Our Volunteers**

It's [National Volunteer Week](#) in Canada, and we want to say thank you! STEP Canada couldn't exist without the help and dedication of our volunteers, who have significantly contributed to the success of the organization. We value and appreciate the time and effort that is donated. Thank you!

## **STEP's CPD Policy**

STEP Worldwide has produced an informative [video](#) for members, outlining the guidelines of the new CPD policy. We encourage members to set aside a few minutes to review the video linked below. For further questions, please contact [cpd@step.org](mailto:cpd@step.org).

All resources mentioned in the video can be found on the STEP Worldwide website in the [CPD centre](#). You will need your STEP Worldwide username and password to access the materials. For login assistance, please contact [memberservices@step.ca](mailto:memberservices@step.ca).



## **Membership Renewal**

Spring is in the air, which means it's also time for STEP's membership renewal campaign. Every March, STEP mails out notification letters to all members via Canada Post. These letters were sent out early last month as a friendly reminder that membership fees were due as of April 1, 2016. If you have not yet renewed your membership with STEP Canada, please [sign-in](#) to your member account to renew online. You may also reach out to our member services team at the STEP Canada national office and renew your membership over the phone with a credit card. STEP continues to deliver opportunities of unparalleled education, representation and networking to members. We look forward to another successful year and thank you for your continued support.

### **Call us today!**

Member Services

[memberservices@step.ca](mailto:memberservices@step.ca)

416-491-4949 x221

## 11th Annual STEP Private Client Awards 2016/17

The [STEP Private Client Awards](#) provides practitioners and their firms an opportunity to demonstrate excellence to peer groups and clients. Now in its 11th year, this prestigious award ceremony identifies eminence among private client solicitors, lawyers, accountants, barristers, bankers, trust managers and financial advisors. The Awards are open to both STEP members and non-members. Recognition at the Awards serves as an endorsement of your team, your firm, and Canada as a jurisdiction. Entries are open until **April 29, 2016** and will be assessed by an independent panel of expert judges. [Click here](#) to view the 15 global award categories. For full criteria and information on how to enter, please visit [www.steppca.org](http://www.steppca.org)

## Certificate in Estate and Trust Administration

STEP's self-study online CETA program is of value to individuals who want to start or advance their career, and to employers who want to seize the many business opportunities resulting from today's changing demographics. Organizations staffed by knowledgeable estate administrators and trust officers who can skillfully manage this changing market will attract new clients and business prospects. [Click here](#) to learn why so many individuals have enrolled in this educational offering. The first of the three courses in the CETA program, *CETA1: Foundations of Estate and Trust Administration*, now qualifies for 30 continuing education (CE) credits, accredited by the [Institute of Advanced Financial Education](#) (IAFE).

## 2016 Upcoming Branch/Chapter Events

### Toronto

April 13

[Insurance in Estates and Trusts](#)

### Vancouver

April 14

[Registered Assets at Death  
\(Planning Beyond the Beneficiary  
Designation\)](#)

### Calgary

April 19

[Tax and Other Case Law Update](#)

### Atlantic

May 5

[Sparkling Reception](#) + *Annual  
Branch Meeting*

### Winnipeg

May 10

[Cross-Border Issues](#)

### Saskatchewan

May 11

[US Tax Planning](#) + *Annual  
Branch Meeting*

### Edmonton

May 12

[Use of Digital and other Media in  
our Practice](#) + *Annual Branch  
Meeting*

### London

May 18

[Planning Using Trusts \(Webcast\)](#)  
+ *Annual Branch Meeting*

### Ottawa

May 18

[Federal Budget 2016](#) + *Annual  
Branch Meeting*

### Montreal

May 19

[Life Insurance Topics](#)

**Okanagan**

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June 8

[Practice Points for an Ageing  
Population](#)

Contact Us | Phone: 416-491-4949 ext.221 | [www.step.ca](http://www.step.ca)

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