

STEP Canada Insider

E-Newsletter Vol. 5
Issue 04 - April 11, 2017



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.



Practitioner Opportunities

STEP Canada's Practitioner Opportunities service is a great resource for practitioners in the trust and estate industry who are seeking new professional ventures, and offers employers the chance to connect with qualified people. STEP members receive a discounted rate to post on our [job board](#). To learn more about this service, please [click here](#).

Current Opportunities

- [Advanced Solutions Specialist – Tompkins Insurance Services, Toronto, ON](#)
- [Estate and Trust Consultant – Scotia Wealth Management, Toronto, ON](#)

Education Center

Certificate in Estate and Trust Administration (CETA)

All exam marks have been released. Congratulations to our first set of graduates who have completed the CETA program!

CETA continues to be an innovative educational offering designed to enhance the knowledge and performance of Canadian estate administrators, trust officers, junior trust officers, retail bankers, law clerks, junior associates, paralegals, wealth management sales representatives, and administrative assistants working in the area of estates and trusts.

Registration is now open for the next set of CETA exams, scheduled for **September 18**,

- [Family Office Director – First Affiliated Holdings Inc., GTA or Collingwood, ON](#)
- [Trust Officer – Legacy Private Trust, Toronto, ON](#)
- [Trust Officer – Scotia Wealth Management, Vancouver, BC](#)



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



2017. Please [click here](#) to enrol.

Diploma Program

The next Diploma Program exams are scheduled for **May 29, 2017** and **November 27, 2017**. To register for the next course, please complete the [registration form](#) and email it to education@step.ca. Students writing the May exam will receive details on deferrals and tutorial dates this week.

Qualified Practitioner Program

The next essay intake deadline is **May 1, 2017**. Essay topics must be selected from the pre-approved list of topics on the [website](#). Please email your submissions to education@step.ca



A Big STEP Thank You to Our Volunteers

National Volunteer Week is April 23-29th. We want to say thank you to all of our hard-working volunteers. STEP Canada couldn't exist without your help and dedication, which has significantly contributed to the success of this organization and its impact in the industry. Thank you!

Register for STEP Canada's 19th National Conference

The STEP Canada national conference has established itself as a must-attend event for domestic and international practitioners, offering unsurpassed networking and continuing education opportunities. The 19th National Conference is taking place on **Monday, June 12 - Tuesday, June 13, 2017** at the **Metro Toronto Convention Centre**. Visit the [event website](#) for more information.

Membership Renewal

STEP Canada's annual membership renewal campaign was initiated last month. Notification letters were sent to all members via Canada Post. These letters are friendly reminders that membership fees were due as of April 1, 2017. If you haven't already renewed your membership, please do so today by signing into your [STEP Canada account](#); by calling our member services department (1-877-991-4949 x221); or by mailing a cheque to our national office. STEP continues to deliver opportunities of unparalleled education, representation and networking to members. We look forward to another successful year ahead and thank you for your continued support.



NEW Student Progress Report

In an effort to ensure students stay on track in their respective education program, STEP has developed a new student progress report, which captures program start date, projected completion date, upcoming exam dates, and current status within the program (passes, fails, deferrals, and exemptions). The reports were mailed to all students the last week of March and will become an annual report moving forward. We hope students find this report useful as they progress toward the TEP designation and full membership. Should you have any inquiries on your status, please email education@step.ca.

Now Accepting Entries for the 12th Annual STEP Private Client Awards 2017/18

The STEP Private Client Awards are seen as the hallmark of quality within the private client industry. Open globally to both STEP members and non-members, these prestigious awards recognize and celebrate excellence in the industry. All entries undergo a rigorous judging process with up to five finalists in each category. Judges are supported by an independent panel of experts, comprised of internationally renowned practitioners in wealth management. This year's awards ceremony will be held on **September 6, 2017** in **London, England**. For more information about the Private Client Awards and how to submit an entry, please visit www.steppca.org.

Family Enterprise Advisor (FEA) Program - Special Offer for STEP Members

TEP Testimonial:

"Before I took the program I mainly dealt with just the business owner, I didn't really probe into areas beyond my technical tax expertise. Now I have meaningful conversations with family members and I am able to identify non tax related issues that need to be considered."

- *Kathy M. Munro, FCPA, FCA, FEA, TEP; PwC Partner, Tax*

The FEA Program prepares advisors to handle the complexities inherent to business families. Take your advising expertise to a whole new level and become a trusted source of insight for your family enterprise clients. STEP members receive a 10% discount on the 2017 FEA Program, which starts next month in Calgary.



For more information regarding the Family Enterprise Xchange and the FEA Program, please visit, <https://family-enterprise-xchange.com/fea>.

Next Upcoming Branch/Chapter Events

Toronto Branch

April 12, 2017
[Estate Planning for Global Families](#)

London Chapter

May 3, 2017
[Estate Planning for Blended Families](#) + *Annual Chapter Meeting*

Montreal Branch

May 11, 2017
[Review of Recent Case Law on Trusts, Estates and Wills \(Civil Law\)...](#) + *Annual Branch Meeting*

Winnipeg Branch

May 16, 2017
[Developments in Canadian Pensions](#)

Saskatchewan Chapter

May 17, 2017
[US Tax and Estate Update](#) + *Annual Chapter Meeting*

Vancouver Branch

May 25, 2017
[Estate Planning from a Family Law Perspective](#) + *Annual Branch Meeting*

Calgary Branch

April 19, 2017
[Estate and Trust Case Law Update, Trust Treatment in Spousal / Partner Disputes](#)

Edmonton Branch

May 11, 2017
[Border Barriers to the Mobile Client](#) + *Annual Branch Meeting*

Okanagan Chapter

May 11, 2017
[Family Trusts and Estates – When the CRA Comes Knocking and Other Topical Issues](#) + *Annual Chapter Meeting*

Ottawa Branch

May 17, 2017
[Economic Update and Budgeting](#) + *Annual Branch Meeting*

Atlantic Branch

May 25, 2017
[3rd Annual Sparkling Reception](#) + *Annual Branch Meeting*

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