



Welcome to the STEP Canada Insider

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

Next Scheduled Branch & Chapter Events

[Click here](#) to discover upcoming regional branch and chapter events.



Practitioner Opportunities

Current Career Opportunities

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

Estate Litigation Lawyer – WEL Partners, Toronto, ON

Expository Article Writer, Wills, Trusts and Estates – STEP Canada

Manager, National Oversight (Estate and Trust) – Scotia Wealth Management, Toronto, ON

Regional Vice-President, Wealth Planning – Assante Private Client, Vancouver

Tax Specialist (Permanent / Full-time) – MD Financial, Ottawa, ON



Education Center

French Education Initiatives

The French language CETA and Diploma programs are open for registration. For those already enrolled, the CETA *Cours de base en administration de successions et de fiducies (Foundations of Estate and Trust Administration)* exam is scheduled for September 17, and the Diploma *Droit des fiducies (Law of Trusts)* exam will be held on May 14.

For more information regarding our French programs, please visit www.step.ca/french.

Certificate in Estate and Trust Administration

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](#).



We offer 30-day job postings, which can be viewed 24 hours a day, 7 days a week. Our [website](#) receives more than 3,500 visits per month, and traffic is driven to the [Practitioner Opportunities](#) page via our monthly e-newsletter, the STEP Insider, which is shared with our membership of over 2,500 potential candidates. To learn more about this service, please [click here](#).

[Learn More](#)

(CETA)

CETA exam sittings are scheduled for September 17, 2018 and March 4, 2019. CETA 2-4 course marks have been distributed to students. Successful students can [register](#) for the next CETA exam online.

Assessment by Exam

Diploma Program exam sittings are scheduled for May 14 and November 5, 2018. Exam tutorials are taking place this week. Please contact education@step.ca if you have not received the tutorial information. In preparation for the online exams, students are asked to download the Examplify software. Instructions will be shared via email this week. It is important to follow the instructions carefully to ensure you are prepared for exam day.

Course registration is easier than ever before! Students can now enroll through our [online registration](#) system.

Assessment by Essay

The next essay intake dates are scheduled for May 1 and October 1, 2018. [Click here](#) for the pre-approved list of essay topics. Please email education@step.ca if you have questions regarding your essay submission.

[Contact Education](#)

Thank You to Our Volunteers

National Volunteer Week is April 15-21, 2018. STEP would like to acknowledge the incredible contributions of our volunteers. Thank you for your hard work and dedication to this organization. We couldn't excel without your support. Thank you!

20th National Conference 2018

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 2018 conference is happening next month in downtown Toronto. Join us alongside 750+ fellow practitioners for 2 days of quality technical sessions and insightful keynotes. Click the image below for more information. We hope to see you in May!



"This conference is always an impressive congregation of the brightest tax minds with an unbelievable sharing of knowledge and ideas."

STEP CANADA 20TH NATIONAL CONFERENCE

MAY 28-29, 2018 | METRO TORONTO CONVENTION CENTRE
HOST HOTEL: DELTA TORONTO

REGISTRATION AND DETAILS

PLAY VIDEO

Hear from 2017 attendees

STEP
Canada
ADVISING FAMILIES ACROSS GENERATIONS

Membership Renewal

Annual membership fees were due as of April 1st, 2018. Notification letters were sent to all members and students via Canada Post last month, and an email reminder was sent last week. Members can submit payment by visiting www.step.ca and signing into their STEP Canada account. Members may also pay over the phone by contacting our member services department at 1-877-991-4949 x221.

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.

Now Accepting Entries for the 13th Annual STEP Private Client Awards 2018/19

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 November 7, 2018 in London, UK. This black-tie event attracts over 700 private client practitioners and offers exceptional networking opportunities. 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

Family Enterprise Xchange (FEX) is once again pleased to offer STEP members a **10% discount**

on 2018 offerings of the FEA Program. This is the only professional development program leading to a designation that will distinguish you as a Family Enterprise Advisor (FEA) to business families. Whether you are an accountant, lawyer, banker, investment advisor, wealth manager or insurance professional, the FEA Program augments your formidable technical skills with strategies and tools to incorporate social and human considerations into your role as a trusted advisor. Visit family-enterprise-xchange.com/fea for details.



Upcoming 2018 FEA PROGRAMS | Calgary: May 28

To learn more, contact Peter Cotterill:
pcotterill@family-enterprise-xchange.com | 778.991.3365



TEP Testimonial:

"As much as the TEP designation identifies qualified trust and estate practitioners, the FEA designation is quickly becoming the standard in Canada to identify family enterprise advisory specialists. The FEA Program compels advisors to step back from their technical wheelhouse and provides critical context for advisors in their work with transgenerational family businesses."

- Cindy Radu, TEP, FEA | Partner BDO Canada LLP

Upcoming Branch & Chapter Events

For event details, [click here](#) to access branch/chapter microsites.

Toronto Branch

Wednesday, April 11
Tax Update and Related Issues

Calgary Branch

Wednesday, April 18
Tax Update - Major Tax Changes for Private Businesses and 2018 Budget

Montreal Branch

Thursday, May 3
Estate & Trust Jurisprudence Review (Civil Law)

Atlantic Branch

Thursday, May 10
Planning Through the Ages & Annual Branch Meeting

Vancouver Branch

Thursday, May 10
Estates in a Digital Age & Annual Branch Meeting

Winnipeg Branch

Tuesday, May 15
Medically Assisted Dying and Health Care Directives

London & SWO Chapter

Wednesday, May 16
Tax Update Presentation – Consider Current Issues for Professional Corporations, Small Business Deduction Changes, Finance's Proposed Paper on Income Splitting & Annual Chapter Meeting

Ottawa Branch

Wednesday, May 16
Budget Update & Annual Branch Meeting

Okanagan Chapter

Thursday, May 17
Wills Variation Actions & Annual Chapter Meeting

Saskatchewan Chapter

Wednesday, May 23
Life Insurance Policy Transfers,
Implications of the 2016 Federal Budget &
Annual Chapter Meeting

Edmonton Branch

Thursday, May 24
Collision of Care at the Intersection of
Medicine and Capacity & Annual Branch
Meeting

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Contact Us | Phone: 416-491-4949 ext.221 | Toll-free: 1-877-991-4949 | www.step.ca