STEP Canada Insider

E-Newsletter Vol. 4
Issue 8 - August 9, 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.

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

Education Center

Local Student Liaison Officers
Get in touch with your Student Liaison Officer to learn about local events and opportunities that add value to your professional development and your student journey with STEP Canada!

Your Student Liaison Officers are volunteers of your local Branch or Chapter and belong to the National Student Liaison Committee.

Certificate in Estate and Trust Administration

- [Director, Aboriginal Trust Services – BMO Financial Group, Calgary, AB]
- [Trust Officer – Scotiabank, Victoria, BC]

Visit our online job board any day of the week for the most up-to-date job postings.

Learn More

(CETA)
The next exam date for CETA1, CETA2, and CETA3 students is scheduled for **September 19, 2016** (online exam).

To register for your next exam, please visit the CETA webpage.

Diploma Program
The next exam date for the Diploma Program is scheduled for **November 28, 2016** (paper-based exam). To register, please complete this form.

Qualified Practitioner Program
The next essay intake deadline is **October 1, 2016**. Please view the list of current approved essay topics. If you are submitting an essay, please ensure you have reviewed essay and submission guidelines.

Please contact education@step.ca for more information on STEP's education programs.

Contact Education

STEP Worldwide Introduces New Learning Opportunities for Members

STEP has introduced a new "STEP CPD Learning" series of short courses, covering technical and non-technical subjects. The courses are online and on-demand, so you can access and study the materials without waiting for set course dates. There is also no assessment at the end of the course.

FATCA: Law & Practice is the first course in the series and takes an average of 10 hours to study. It is designed to help practitioners understand the Foreign Account Tax Compliance Act (FATCA), Intergovernmental Agreements (IGAs), "UK FATCA" and the Common Reporting Standards (CRS). Click here to view the brochure. For a full syllabus and to enrol, please visit the CLTI website.

Anti-Money Laundering is a certificate course that provides you with all of the essential knowledge needed to establish a successful career in this field, no matter where you are located.

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

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 in January 2017 in Toronto and Vancouver, and in May 2017 in Calgary.

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

For more information regarding the IFEA and the FEA Program, please visit Ifea.ca/feap.

STEP Private Client Awards – September 8, 2016 – London

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. The Awards will be presented in London on September 8, 2016. The list of finalists is available for public viewing, including three Canadian nomination finalists! For more information on the Private Client Awards, please visit www.steppca.org.

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.

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.

ANNOUNCING a STEP Canada National Full-Day Course: Canada/US Tax and Estate Planning: Cross-Border Issues

This always timely one-day course equips practitioners with a thorough description of all the relevant law and planning strategies they need to serve their clients with cross-border estate planning and US taxation issues, especially to enable them to identify these issues and the appropriate treatment. Expert Ed Northwood explains the following topics from a practical legal perspective: the US transfer tax system as it relates to both US and Canadian residents; US estate and gift tax; the consequences of obtaining and renouncing US citizenship; the rules subjecting individuals, estates, and trusts to taxation as residents; the rules governing trusts that have US settlors and beneficiaries or that earn US-source income; the passive foreign investment company rules; and the controlled foreign corporation rules. Numerous practical examples and strategies are provided. Support materials include copies of relevant statutes and regulations, IRS forms and instructions, secondary-source materials, illustrative diagrams, and model documents.

Tour dates:
Kelowna – September 13
Vancouver – September 15
Halifax – October 27
Montreal – November 2
Calgary – November 8
Edmonton – November 10
Winnipeg – November 15
Toronto – November 29
Ottawa – January TBA

Watch your email for course registration details.

STEP Worldwide Council Elections

We are conducting an online vote for one available position on the STEP Worldwide Council. Nominated candidates will be presented on the voting webpage along with their election statements. The winner will become a Canadian representative to the STEP Worldwide Council for a three-year term ending in December 2019. Full members in good standing of STEP are permitted to vote. An email will be sent out this week with further instruction. Voting will close at 12-Midnight Pacific Time on Wednesday, August 31, 2016.

National Conference 2017 Dates

Mark your calendars! STEP Canada's 19th National Conference is scheduled for Monday and Tuesday, June 12-13, 2017 at the Metro Toronto Convention Centre.

2016 Upcoming Branch/Chapter Events

Toronto

September 14, 2016
Disability Planning

Montreal

September 15, 2016
The Holding and Transfer of Wealth: Exchange between Practitioners

Saskatchewan

September 15, 2016
Pecore vs Pecore – 9 Years Later

Winnipeg

September 20, 2016
CPP - Myths and Legends

Ottawa

September 21, 2016
What's New in Goodwill Sales and Succession Planning

Calgary

September 22, 2016
Different Jurisdictions, Different Laws: How Conflicts in Laws can Impact an Albertan's Estate Planning Administration

Edmonton

September 22, 2016

Okanagan

September 22, 2016

Block Chain Technology

Practical Issues of Settling a Trust

Vancouver

October 6, 2016
Real Estate on your Clients' Mind: How to Plan for the Principal Residence, the Laneway House, the Income Property and the Cross Border Vacation Home

London & Southwestern Ontario

November 1, 2016
Wealth Planning Strategies for Canadian Women

Atlantic

TBA
Planning for the 3 Fs: Farming, Fishing, Forest

Return to Top

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