STEP Canada Insider

E-Newsletter Vol. 5
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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

- Estate and Trust Consultant – Scotia Wealth Management, Barrie, ON

Education Center

French Education Initiatives

French language courses with a civil law focus will launch this fall for both the CETA and Diploma programs. Click here for more information or contact education@step.ca.

Certificate in Estate and Trust Administration (CETA)

The upcoming CETA exams are scheduled for **September 18, 2017**. All students writing have been notified of exam tutorial dates and times. Please email education@step.ca if you have not received this. Watch your inbox for online proctoring instructions, which will be sent

- [Private Client Portfolio Manager – Altitis Investment Counsel, Victoria, BC]
- [Regional Vice-President, Wealth Planning – Assante Private Client, Winnipeg, MB]
- [Senior Trust Officer – Scotia Wealth Management, Toronto, ON]
- [Tax and Estate Planner – TD Private Wealth Management, Vancouver, BC]

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

Learn More

this week. It is important to test your technology requirements prior to exam day.

Diploma Program
The next set of exams will be held on November 27, 2017 (in English) and May 14, 2018 (in English and French). To register for your exam, please click here.

Qualified Practitioner Program
The next essay intake date is October 1, 2017. Essay topics must be selected from the pre-approved list of topics on the STEP Canada website.

Mentorship Program
The STEP Canada Mentorship program has launched for Qualified Practitioner students. Students in this program have received an invitation to fill out a survey and be matched with a full TEP mentor. The role of the mentor is to offer guidance during a student's journey toward achieving the TEP designation.

Contact Education

Registration NOW Open! STEP Canada Full-Day Course: Taxation at Death and Post Mortem Planning

Presented by: *Chris Ireland, CPA, CA, TEP, Vancouver: PPI Advisory; Deputy Chair, STEP Canada*

The course will review various tax and legal issues pertaining to post mortem planning for the ownership of private company shares and other taxation on death issues, specifically:

Taxation on death – an overview of the deeming rules; review of the various rollovers on death and the QSBC exemption; review of the rules pertaining to certain special assets – registered plans, rental real estate, principal residence; charitable donations; and a review of the various terminal returns.

Post mortem planning for private company shares – three case studies; illustrating the three levels of tax; overview of the post mortem planning alternatives (including the impact of the July 18, 2017 Federal Government proposals); a review of the Income Tax Act provisions that could apply; tax rate considerations; general rules and planning considerations; detailed review of the case studies; hybrid planning and whether or not it is still possible; stop-loss rules; “short snappers” for the tax and legal considerations; review of a post mortem planning decision tree; and an overview of the reference materials. US content will be limited to issue identification and not a detailed review.

Registration fees include 7.0 technical hours of CPD; binder & USB of course materials; reference resources; refreshments and buffet lunch. Registration opens at 8:30 am; course begins at 9:00 am; course adjourns at 4:30 pm.

Exclusive to registrants of this course – specific areas of this course material affected by the final outcome of the July 18, 2017 Department of Finance consultation paper and draft legislation will be summarized with planning considerations in early-spring via webcast featuring Chris Ireland.

STEP Member	**$495.00 + tax**
Not a STEP Member	**$645.00 + tax**

Capacity limited to 45 students.

Click the button below to register.

Register Now!

Coming to your area:

Date	Branch/Chapter	Location
September 14 2017	Vancouver	UBC Robson Square, Vancouver
September 19 2017	Okanagan	Hotel Eldorado, Kelowna
October 5 2017	Atlantic	Casino Nova Scotia, Halifax
October 26 2017	Calgary	The Ranchmen's Club, Calgary
November 15 2017	Edmonton	Royal Glenora Club, Edmonton
November 23 2017	Saskatchewan	Delta Bessborough, Saskatoon
December 5 2017	Toronto	Ivey Leadership Centre, Toronto
December 7 2017	London & SWO	Four Points by Sheraton, Cambridge
January 23 2018	Montreal	TBC
January 25 2018	Ottawa	TBC
February 1 2018	Winnipeg	Fairmont Winnipeg, Winnipeg

12th Annual STEP Private Client Awards - Winners Announced Next Month!

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 2017-18 finalists have been announced and the list is now available for public viewing. Winners will be revealed at the Private Client Awards ceremony on September 6, 2017, at the Park Plaza Westminster Bridge Hotel in London. If you're planning to attended, please be sure to book a table. The judges have shortlisted five practitioners for the Trusted Advisor of the Year 2017/18 award, and we're inviting you to vote for the winner of this prestigious category.

For more information about the Private Client Awards and how to purchase tickets, please visit www.steppca.org.

STEP/CRA Round Table Question Collection

The STEP/CRA Round Table Committee invites your questions for consideration at the next round table. Please submit your question(s) to STEProundtablequestions@step.ca.

20th National Conference 2018 Dates

Mark your calendars! STEP Canada's 20th National Conference is scheduled for Monday and Tuesday, May 28-29, 2018 at the Metro Toronto Convention Centre.

2017-18 Branch/Chapter Events

STEP branches and chapters are in the process of planning their 2017-18 education season. Seminar details including, dates, topics, and speakers will become available in the coming months. STEP Toronto has opened registration for the September seminar and social event. The STEP Toronto Value Passport is also available for purchase. Event and passport registration for the remaining branches/chapters will open shortly.

Upcoming Branch/Chapter Events

Toronto Branch

September 13, 2017
Intersection of Family, Tax, and Estate Law

Montreal Branch

September 14, 2017
Trust & Estates - Valuation Issues in Light of Recent Case Law
(Study Session)

Winnipeg Branch

September 19, 2017
**proposed date*
Millennials and Advice

Calgary Branch

September 20, 2017
TBA - Program and passport details available at a later date.

Saskatchewan Chapter

September 20, 2017
2017 Tax Update

Edmonton Branch

September 21, 2017
Private Lives and Death

Ottawa Branch

September 27, 2017
TBA - Program and passport details available at a later date.

London & Southwestern Ontario Chapter

October 11, 2017
TBA - Program details available

at a later date.

Vancouver Branch

October 26, 2017
Important Recent Changes Affecting Small Business and Professional Corporations
Cocktail Reception to follow

Atlantic Branch

November 23, 2017
Practical Guidance for Trust Administration

Okanagan Chapter

November 22, 2017
Multiple Will Planning for Individuals with Private Company Shares

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