



## 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.

Associate Trust Officer – Scotiabank, Vancouver, BC

Director, Tax & Estate Planning – Investors Group, Winnipeg, MB

Estate Planning Practitioner (Notary or Lawyer) – Assante Private Client, Dorval, QC

Regional Estate and Trust Administrator – MD Private Trust (MD Financial Management), Toronto, ON

Senior Estates Accounting Professional – WEL Partners, Toronto, ON

Strategic & Operations Consultant, Estate & Trust Services – Raymond James Ltd., Toronto, ON or Vancouver, BC

Tax Planning Practitioner (Lawyer, Notary or Accountant) – Assante Private Client, Dorval, QC

## Education Center

### Exam Sittings & Essay Intake Dates

Education Program	Exam/Essay Dates
CETA	September 17, 2018 March 4, 2019
Assessment by Exam (Diploma Program)	November 5, 2018 May 13, 2019
Assessment by Essay	October 1, 2018 May 1, 2019

### French Education Initiatives

The French language CETA and Diploma programs are open for registration. For more information regarding our French programs, please visit [www.step.ca/french](http://www.step.ca/french).

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

For students registered to write the September 17th exam, please remember exam tutorials are

Tax Planning Practitioner (Lawyer or Accountant) – Assante Private Client, Winnipeg, MB or Toronto, ON

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. The STEP Canada [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 2,600 potential candidates. To learn more about this service, please [click here](#).

[Learn More](#)

scheduled August 20th-23rd. Tutorial details have already been emailed to students. Online proctoring instructions will be shared this week. If you have questions regarding the tutorial or proctoring instructions, please contact [education@step.ca](mailto:education@step.ca). To register for an upcoming CETA exam, [click here](#).

#### **Assessment by Exam (Diploma Program)**

We are now accepting registrations for the November 5 and May 13 exam sittings. To register for the English (common law) exam, [click here](#). To register for the French (civil law) exam, [click here](#).

#### **Assessment by Essay**

[Click here](#) for the October 1 pre-approved list of essay topics. Please email [education@step.ca](mailto:education@step.ca) if you have essay submission questions.

#### **Mentorship Program**

Phase III of the national mentorship program has now launched for the CETA program. The Assessment by Exam (Phase I) and Assessment by Essay (Phase II) mentorship programs are ongoing. All students interested in having a TEP mentor can email [education@step.ca](mailto:education@step.ca).

[Contact Education](#)

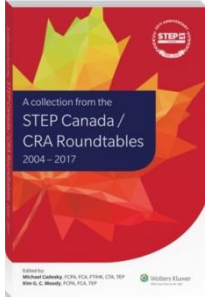
## **STEP Canada's 20th National Conference**

STEP Canada's 20th National Conference was a truly memorable experience, one we want to share! We've created a short video capturing event highlights, special moments, and delegate commentary. Click the button below to see the compilation and hear what attendees had to say!

[▶ PLAY VIDEO](#)

**Mark your calendars!** STEP Canada's 21st National Conference is scheduled for Thursday and Friday, June 6-7, 2019 at the Metro Toronto Convention Centre.

## STEP Canada / CRA Roundtables | 2004-2017



The STEP Canada/CRA Roundtable session at the annual national conference has been a crowd favourite since its conception in 2004. To commemorate our 20th anniversary, we collaborated with Wolters Kluwer to publish a collection of questions and answers from roundtable sessions held over the last 13 years. Edited by STEP members, Michael Cadesky and Kim Moody, this unique assemblage of roundtable highlights offers STEP members a resource of valuable information they can reference for years to come. To purchase your copy, please visit the Wolters Kluwer website, <https://go.wolterskluwer.ca/step-book/>.

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## STEP/CRA Roundtable Question Collection

The STEP/CRA Roundtable Committee invites you to submit questions for consideration. If selected, your question(s) will be presented during the annual roundtable session at the 21st National Conference. Please submit your question(s) to [STEProundtablequestions@step.ca](mailto:STEProundtablequestions@step.ca).

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## STEP Private Client Awards 2018

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 [2018 list of finalists](#) is now available for public viewing. Congratulations and best of luck to the following Canadian finalists:

**Contentious Trusts and Estates Team of the Year (large firm)**

Borden Ladner Gervais, Canada

**Contentious Trusts and Estates Team of the Year (midsize firm)**

Hull & Hull, Canada

**Financial Advisor Team of the Year**

Woodgate Financial Inc., Canada

**Multi-Family Office Team of the Year**

GENn Family Office, Canada

**People's Choice - Trusted Advisor of the Year**

Cindy Radu, BDO, Canada

The award ceremony attracts over 700 private client practitioners and offers exceptional networking opportunities. This year's awards ceremony will be held on November 7, 2018 in London, UK.

For more information about the Private Client Awards, please visit [www.steppca.org](http://www.steppca.org).

## STEP Worldwide Council Elections

STEP Canada is entitled to have three elected members represent Canada on STEP Worldwide Council. Please be advised that STEP Canada will be holding an election for **one** representative to STEP Council for a three year term ending in 2021. A Notice of Nomination and further details will be sent to all full members at the end of August.

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## STEP Global Congress 2018

STEP's third Global Congress will take place on September 13-14, 2018 in Vancouver, Canada, following the 2016 congress in Amsterdam, Netherlands and the 2014 inaugural congress in Miami, Florida, USA. This year's congress promises to be a must-attend event in your STEP calendar!

[Click here](#) for more information.



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## STEP Referral Rewards

Help expand the STEP network! According to the 2017 STEP Members' Satisfaction Survey, 97% of STEP members would recommend the organization to a colleague. When you recommend a colleague, you will be entered into a prize draw to win an iPad. All you need to do is [login](#) to your STEP Worldwide account and complete the member referral form. STEP will provide your colleague with all the information needed to join.

Visit <https://www.step.org/recommend-colleague> for more information.

## Upcoming Branch & Chapter Events

STEP Canada branches and chapters are in the process of planning the 2018-19 education season. STEP Edmonton, Montreal, Okanagan, Toronto, Vancouver, and Winnipeg have already opened registration for the upcoming fall events. The remaining seminar details and event registration will become available in the coming weeks. The Value Passport is also available for applicable branches and chapters. For details, [click here](#) to access branch/chapter microsites.

### **Montreal Branch**

Thursday, September 6  
[LIRAs, LIFs and Locked-In RRSPs](#)  
[Following Death in Quebec](#)

### **Winnipeg Branch**

Tuesday, September 18  
[Tax on Split Income \(TOSI\) Rules](#)

### **Vancouver Branch**

Thursday, September 20  
[Implications of Offshore Trusts for Domestic Clients: The Why, What, How of Your Client's Offshore Trusts](#)

### **Atlantic Branch**

*Program and passport details available at a later date.*

### **Ottawa Branch**

Wednesday, September 26  
[Avoiding and Dealing with Insolvent Estates](#)

### **Southwestern Ontario Chapter**

*Program details available at a later date.*

### **Toronto Branch**

Thursday, September 13  
[Tax Planning for Private Corporations - What's Left?](#)

### **Edmonton Branch**

*Thursday, September 20*  
*Blended Families and Matrimonial Issues in Estate Planning*

### **Okanagan Chapter**

*Thursday, October 11*  
*Joint Tenancy Issues in Estate Planning*

### **Calgary Branch**

*Wednesday, September 26*  
*US Tax Changed Impacting Canadians*

### **Saskatchewan Chapter**

*Wednesday, September 26*  
*Tax on Split Income (TOSI) Update*

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