

# STEP Canada Insider

E-Newsletter Vol. 3  
Issue 12 - December 8, 2015



## Welcome to the STEP Canada Insider!

With access to the monthly STEP Insider, readers will receive the latest news about branch/chapter activity, national conference updates, practitioner opportunities, education, and more!

## Next Scheduled Branch/Chapter Events

[Click here to see YOUR next regional branch event](#)



## Practitioner Opportunities

STEP Canada's Practitioner Opportunities service offers an electronic recruitment resource for the trust and estate industry. We are offering this recruitment tool to all STEP members at a discounted rate! Please visit our [Practitioner Opportunities](#) page for more information.

### Current Opportunities

[Associate Director, Gift & Estate Planning – The University of British Columbia, Vancouver](#)

[Development Officer, Gift & Estate Planning – The University of British Columbia, Vancouver](#)

[Estate and Trust Advisor – MD Financial Management, Saskatoon](#)

## Education Center

### Congratulations Graduates!

Congratulations to all of our Diploma Program and Qualified Practitioner graduates from the fall 2015 term! Don't forget to submit your upgrade application form before March 31, 2016 for full membership rights.

### Qualified Practitioner Route

New essay topics have been published and are applicable for May 1, 2016 submissions, onwards. Please click [here](#) to view the new list.

### Exam Information

The remaining Diploma Program exam results will be released after the holidays. You can expect to see them in early January.

### Certificate in Estate and Trust

[Estate & Trust Advisor – TD Bank, Vancouver](#)

[Executive Trust Officer – TD Bank Group, Markham](#)

[Trust Officer – Scotiabank, Victoria](#)

## Administration (CETA)

The CETA2 tutorial is scheduled for Wednesday, January 6, 2016 between 12:00pm – 1:00pm. Please contact [education@step.ca](mailto:education@step.ca) if you have not received the dial-in details. The CETA2 online exam will take place on Monday, January 25, 2016.

[Learn More](#)

[Contact Education](#)

## Recent STEP eNews

If you haven't had a chance to review the latest STEP eNews, please click on the links below to access the PDFs, or visit the STEP Canada online [Press Room](#) at your convenience.

- **November 16, 2015: eNews – STEP Canada Tax Technical Committee**  
[Finance Acknowledges Concerns About Unintended Results Arising from New Taxation Rules in Effect in 2016](#)
- **2015 STEP Canada — CRA Round Table – Final Consolidated Q & As**  
[STEP Canada 17th National Conference CRA Round Table Final Consolidated Q & As](#)

## 2016 National Conference – Send us your ideas!

STEP Canada's 18<sup>th</sup> National Conference will take place **Thursday and Friday, June 9 and 10, 2016** at the [Metro Toronto Convention Centre](#). The 2016 National Conference Program Committee **invites members to contribute to the conference content** by submitting session topic ideas; presentation proposals; and questions for the STEP Canada / CRA Round Table. In order to be considered, please send your ideas and proposed questions to [jarmstrong@step.ca](mailto:jarmstrong@step.ca) by **Friday, January 15, 2016**.

## Regional Branch Programs 2015-16

STEP continues to deliver critical and relevant information essential to the trust and estate practice. Take advantage of our educational programs by purchasing the STEP Value Passport, a member only all-access pass to branch events in your area (available for select STEP branches). Purchase your passport, or register for an event by visiting the [Programs & Seminars](#) section of the STEP Canada website and clicking on your applicable branch location.

## Certificate in Estate and Trust Administration

STEP's self-study online CETA program is of value to individuals who want to start or advance their career, and to employers who want to seize the many business opportunities resulting from today's changing demographics. Organizations staffed by knowledgeable estate administrators and trust officers who can skillfully manage this changing market will attract new clients and business prospects. [Click here](#) to learn more about why so many individuals have enrolled in the educational offering.

## Happy Holidays!

We wish all of our members and their families and friends a very happy holiday season! Please note, the STEP Canada National office will be closed on the following days.

### Office closure dates:

December 2015: 24th, 25th, 28th & 31st

January 2016: 1st

## STEP Canada's National Office is Moving

The STEP Canada National Office is currently located in downtown Toronto. The office is moving uptown to Yonge and Sheppard in early January.

### As of January 15, 2016 STEP Canada National Office address:

45 Sheppard Avenue East, Suite 510  
Toronto, ON M2N 5W9

[Click here](#) for directions



## 2015/16 Upcoming Branch/Chapter Events

### Winnipeg

December 15, 2015

[New Philanthropy in Canada](#)

### Edmonton

December 17, 2015

[Big Data and Privacy: How It Affects Us All /Holiday Luncheon](#)

### Montreal

December 17, 2015

[Double Taxation & Post Mortem Concerns \(Open Discussion\)](#)

### Okanagan

January 13, 2016

[Estate Freezes & Trusts: Surprise! Your Client has U.S. Citizenship/Property/Children](#)

### Ottawa

January 13, 2016

[Update on Trust and Estate Law Cases and Review of Treatment of Foreign Assets Held in Estates and Trusts](#)

### Calgary

January 19, 2016

[Proper Planning in Complex Family Situations](#)

### Saskatchewan

January 20, 2016

[Estate Planning: Tips and Traps](#)

### Toronto

January 20, 2016

[Probate Planning and Issues Arising from Drafting and Litigating Secondary Wills](#)

### Atlantic

January 21, 2016

[Family Trust Administration](#)

### Vancouver

January 21, 2016

[2015 - The Year in Review and Wine and Cheese Reception](#)

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