



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

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

[Regional Vice-President, Wealth Planning - Assante Private Client, Toronto, ON](#)

[Lawyer, Wills and Estates - Mann Lawyers, Ottawa, ON](#)

[Planning Services Consultant - PPI, 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

Education Center

Exam Sittings & Essay Intake Dates

Education Program	Exam/Essay Dates
CETA	March 4, 2019 September 16, 2019
Assessment by Exam (Diploma Program)	May 27, 2019 November 4, 2019
Assessment by Essay	May 1, 2019 October 1, 2019

French Education Program

NEW!! The third course *Testaments et administration de fiducies et successions* of the French Diploma Program is now open for registration. 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](#).

Visit our online job board today!



www.step.ca/opportunity

Learn More

French CETA program continues to attract new students. For more information regarding our French programs and registration, please visit www.step.ca/french.

Certificate in Estate and Trust Administration (CETA)

The next exam date for CETA courses is scheduled for March 4th, 2019. You will receive an email with exam instructions in February 2019.

Assessment by Exam (Diploma Program)

Students who wrote an exam on November 5th can expect to receive their marks in the second week of December. Exam results will be sent via email, please ensure your contact information is up to date. Students that registered for a diploma exam in May 2019 are advised that the exam date has changed to May 27th, 2019. Further information and instructions will follow closer to the exam date.

Assessment by Essay

Students that submitted essays in October have been sent their grades via email. If you did not receive your grade, please email education@step.ca

Mentorship Program & Study Groups

STEP Canada's Mentorship Program matches students with TEP volunteers for additional support throughout program studies and professional career guidance. For more information and application details, please contact education@step.ca.

Students interested in forming a study group, please add your contact information to the online [Study Partners Google Document](#). While STEP Canada does not formally arrange study groups or pairings, we hope this document will assist students in organizing their own meetings.

Contact Education

Registration NOW Open and Filling Quickly! 2019 STEP Canada Full-Day Course Succession of the Family Business



Presented by: Cindy Radu, FCPA, FCA, LLB, LLM, ICD.D, FEA, TEP, Calgary; Deputy Chair, STEP Worldwide Business Families Special Interest Committee; Winner, 2018/19 People's Choice – Trusted Advisor of the Year Award (13th Annual STEP Private Client Awards); Member, STEP Calgary

Course Description: This full-day course (8:30 am - 4:30 pm) is designed for Advisors who work with family businesses and family wealth transition. It provides an integrated frame of reference and presents a new approach to family business transition planning. As such, the course will be of interest regardless of area of specialization. A range of “hard” and “soft” topics will be covered from both advisor and family perspectives. Several case studies will be incorporated to illustrate concepts in context. This will be a full-day with opportunities for participants to dialogue and share experiences.

Highlights include:

- impact of working in silos
- introduction to governance
- common issues in family business shareholder agreements
- glitches in insurance planning
- unique financial planning challenges in family businesses

Course registration fees:

STEP Member	\$545.00
Non-Member	\$695.00
Course App	complimentary
Paper Binder	\$80.00 (optional)

Course fee includes:

- 6.50 CPD hours
- user name and password to course app delivering all course material and most resource documents
- light breakfast, morning refreshment, buffet sandwich lunch, and afternoon refreshment
- in addition to course curriculum, comprehensive resource materials will be provided to every delegate, including a hardcover copy of *Complete Family Wealth* (James E. Hughes Jr., Susan E. Massenzio and Keith Whitaker: Wiley, 2017) for independent study and reference after the course date

2019 Full-Day Course Tour Dates:

Calgary - January 8 | Edmonton - January 10
Winnipeg - January 29 | Saskatoon - January 31
Toronto - February 5 | Cambridge - February 7
Ottawa - February 19 | Montreal - February 21
Kelowna - March 5 | Vancouver - March 7
Halifax - March 26

[Register Now](#)

21ST NATIONAL CONFERENCE



JUNE 6-7, 2019
METRO TORONTO CONVENTION CENTRE

21st National Conference 2019

Mark your calendars and prepare to invest in yourself at STEP Canada's 21st National Conference. The two day conference program is designed to meet the continuing education requirements for provincial law societies and accounting Institutes/Orders, and other professional associations by offering 10.75 hours of substantive CPD.

In addition to the many industry-related organizations who will be on exhibition, attendees will have access to two full days of technical sessions, the robust STEP Canada native conference app, continental breakfasts, lunches and health breaks, take-away USBs loaded with session materials, an attractive conference delegate bag, and unparalleled networking opportunities.

WHEN: June 6 - 7, 2019

WHERE: [Metro Toronto Convention Centre](#) | Level 700 - South Building | 222 Bremner Blvd. Toronto, ON

ACCOMODATION: [InterContinental Toronto Centre](#) | 225 Front Street West, Toronto, ON | for reservations: "[STEP Canada 2019](#)" | Nightly Group Rate: \$279.00 (plus applicable taxes) per single or double occupancy based on availability

QUESTIONS? STEP Canada | 416.491.4949 x221 | memberservices@step.ca

2019 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.

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/>.

Happy Holidays!

As the holiday season approaches, we would like to take this opportunity to express our gratitude for your continued support.

May your holidays be filled with much joy and happiness.
We look forward to working together in the coming year!

Please note, the STEP Canada National Office will be closed from Tuesday, December 25th, reopening Wednesday, January 2nd.



From all of us at
STEP Canada

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 2019 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.

For a listing of 2018 FEA designates and some fantastic testimonials from fellow TEPs, [click here](#).



For more information, please contact Renee Nelson:
rnelson@family-enterprise-xchange.com | 905-337-8375 ext. 260
Visit FEX online at family-enterprise-xchange.com/fea

Upcoming Branch & Chapter Events

STEP Canada branches and chapters have an exciting 2018-19 program planned for this fall. The STEP Value Passport is also available for applicable branches and chapters. For more details, [click here](#) to access branch/chapter microsites.

Winnipeg Branch

Tuesday, February 12
US Tax Reform: The Fall-Out so Far for
Individuals in Canada

Toronto Branch

Wednesday, January 9
Strategic Philanthropy

Ottawa Branch

Wednesday, January 16
Discretionary Trusts and Unique Estate-
Planning and Administration Issues

Atlantic Branch

Thursday, January 24
Wealth Planning: Current Tips and Traps
in 2019

Vancouver Branch

Thursday, January 24
2018 Year in Review & 20th Anniversary
Sparkling Reception

Edmonton Branch

Thursday, December 13
Trust and Year End/Beginning Pot Pourri
& Seasonal Social

Okanagan Chapter

Monday, January 14
Incorporating a Shareholders' Agreement
into the Estate Plan and Related
Insurance Needs

Montreal Branch

Thursday, January 17
Changes for Private Corporations and
Trusts – One Year Later, with Practical
Applications

Calgary Branch

Thursday, January 24
Estate and Family Law: Mediation,
Arbitration or Litigation?

Saskatchewan Chapter

Monday, February 11
Update on Philanthropy in Canada &
Annual Chapter Meeting

Southwestern Ontario Chapter

Wednesday, March 6
[Insurance Update](#)

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