

STEP Canada Insider

E-Newsletter Vol. 4
Issue 2 - February 9, 2016



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

[Branch Manager, Trust – Scotiabank, Edmonton](#)

[Consultant, Estates Solutions Centre – CIBC, Toronto](#)

[Executive Trust Officer/Trust Officer – TD Wealth Management, Vancouver](#)

[Office Administrator/Trust Administrator – Cidel Trust Company, Calgary](#)

Education Center

Congratulations to the following students who have achieved academic excellence in 2015. These students will be featured in the May 2016 edition of *STEP Inside*.

Highest Mark in Law of Trusts: Sharon Mendonca, Toronto branch

Highest Mark in Taxation of Trusts and Estates: Denika Heaton, Calgary branch

Highest Mark in Wills, Trust and Estate Administration: Joanne Golden, Toronto branch

Highest Mark in Trust and Estate Planning: Andrea Payne, TEP, London and Southwestern Ontario chapter

Highest Mark in a Qualified Practitioner Essay: Daniel Watts, TEP, Winnipeg

[Scotiabank Estate & Trust Consultant – Scotiabank, Calgary](#)

[Senior Trust Advisor - Team Lead, Estate & Trust Services – RBC Wealth Management, Montreal](#)

[Senior Trust Advisor - Team Lead, Estate & Trust Services – RBC Wealth Management, Toronto](#)

[Trust Officer, Charitable Foundation Services – Scotiabank, Toronto](#)

[Vice-President & Regional Director, Trust Services, Eastern Canada – BMO Private Banking, Montreal](#)

[Wills & Estates Law Clerk – Beard Winter Lawyers LLP, Toronto](#)

branch

Gerald W. Owen Book Prize; Highest Overall Average across all 4 Diploma courses: Justin Hoffman, TEP, London and Southwestern Ontario chapter

2016 Education Calendar at a Glance

Mar 28	Diploma Program: Trust and Estate Planning course assignment #1 due
Apr 28	Diploma Program: Trust and Estate Planning course assignment #2 due
May 1	QP essay submission due Click here to view the new list of essay topics
May 30	EXAM DAY for Diploma students (paper-based), CETA1 and CETA2 students (online)

[Learn More](#)

[Contact Education](#)

Early Bird Registration Opens for 18th National Conference

Registration is now open for STEP Canada's 18th National Conference taking place Thursday, June 9 - Friday, June 10 at the Metro Toronto Convention Centre. The STEP Canada conference has established itself as a must-attend event for domestic and international practitioners offering unsurpassed networking and continuing education opportunities. [Click here](#) for details and registration. Early-bird registration offers a \$100 savings before March 31!



The national conference [Preliminary Program](#) is now available on the STEP Canada website, outlining the many sessions that will be taking place during the event. To hear more from our 2015 attendees, watch this [video](#) highlighting last year's conference!

Membership Renewal

STEP Canada will begin its annual membership renewal campaign next month. Notification letters will be sent to all members via Canada Post in early March. These letters are friendly reminders that membership fees are due as of April 1, 2016. STEP continues to deliver opportunities of unparalleled education, representation and networking to members. We look forward to another successful year and thank you for your continued support.

In Case You Missed It

[STEP Inside - January 2016 Issue](#)

Trust Quarterly Review (TQR)

As a member of STEP, you gain access to a number of publications and resources, including the Trust Quarterly Review (TQR), which is distributed on a quarterly basis. TQR provides readers with in-depth technical papers and analysis from leading practitioners in the field. [Click here](#) to view the December 2015 issue and learn how to tackle bad news faced by international clients. For quick and easy reference you can also review the TQR [highlights](#), a great resource for practitioners on the go.

STEP Industry News Digests

STEP Industry News Digests provide relevant industry news for trust and estate practitioners and other professionals in the wealth management sector, including brief summaries of topical news stories gathered from news providers internationally. This resource is great for busy practitioners who want a quick reference to all the relevant news and issues. The News Digests also feature job listings as well as local STEP branch events and conferences.

STEP currently produces four separate News Digests:

- International News Digest: twice-weekly news
- UK News Digest: twice-weekly news
- North America News Digest: bi-weekly news
- LATAM News Digest: bi-weekly news

[Subscribe](#) to STEP News Digests free of charge, and receive regular updates delivered right to your inbox!

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.

STEP Canada's National Office has Moved!

It's official! The STEP Canada National Office has moved locations and is now situated in uptown Toronto at Yonge and Sheppard. Please note our new address below. Phone and fax numbers will remain the same.

STEP Canada

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

2016 Upcoming Branch/Chapter Events

Winnipeg

February 16
[Estate Planning Tips and Traps](#)

Toronto

February 17
[Post Mortem Planning – Private Corporation Shares](#)

Montreal

February 18
[Trust Pot-Pourri](#)

Vancouver

February 18
[Cutting Edge Charitable Planning](#)

[\(Tax Changes and Innovations in Canada and Around the World\)](#)

Calgary

February 25
[Advanced Philanthropy Planning](#)

Edmonton

February 25
[Another Perspective for Succession Planning for Family Enterprises](#)

Ottawa

March 9
[Effective Use of Insurance in Estate Planning](#)

Saskatchewan

May 11
[STEP Saskatchewan Chapter - US Tax Planning](#)

London

May 18
[TBA](#)

Atlantic

May 19
[Using Insurance as an Estate Planning Tool and Annual Branch Meeting](#)

Okanagan

June 8
[Practice Points for an Ageing Population](#)

[Return to Top](#)

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