

STEP Canada Insider

E-Newsletter Vol. 5
Issue 02 - February 14, 2017



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 & Trust Consultant – Concentra, Saskatoon, SK](#)

Education Center

Certificate in Estate and Trust Administration (CETA)

The next CETA exams are scheduled for **March 6, 2017**. All tutorial slides and audio recordings are now published in the e-classroom for each course. Please look out for an email this week about testing your online system prior to the exam.

Diploma Program

The next Diploma Program exams are scheduled for **May 29, 2017** and **November 27, 2017**. To register for the next course, please complete the [registration form](#) and email it to education@step.ca.

- [President, Conference for Advanced Life Underwriting – CALU, Toronto, ON](#)
- [Private Trust Manager, Producing – TD, Kelowna, BC](#)
- [Senior Advisor and Trust Officer, Trust and Advisory Services NBF/Natcan Trust – National Bank, Winnipeg, MB](#)
- [Senior Trust and Estate Officer – Cidel, Calgary, AB](#)
- [Tax Retirement & Estate Planning Consultant – Manulife Financial, Waterloo, ON](#)
- [Trust Officer Indigenous Trust Services – TD Canada Trust, Winnipeg, MB](#)
- [Trusts and Estates Lawyer – O'Sullivan Estate Lawyers LLP, Toronto, ON](#)

Qualified Practitioner Program

The next essay intake deadline is **May 1, 2017**.

Topics are posted on the [website](#).

Mentorship Program

STEP is in the process of matching up Diploma Program students and their mentors for the Volunteer Mentorship Program. If you have filled out the survey, your local student liaison officer will be in touch shortly with details of the program. Should you have any questions, please email education@step.ca

**Contact
Education**

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

Learn More

Early Bird Registration Opens this Week for 19th National Conference

The STEP Canada national conference has established itself as a must-attend event for domestic and international practitioners, offering unsurpassed networking and continuing education opportunities. The 19th National Conference is taking place on Monday, June 12 - Tuesday, June 13, 2017 at the Metro Toronto Convention Centre. Early-bird registration opens this week. Members and non-members will save \$100 if registered before March 31st! Keep an eye on your inbox for the invitation, or visit our [website](#) for more information.

New Conference Registration Software!

Attendees of the 2017 National Conference will experience a new registration process this year. The event management software, Cvent, will assist us in planning the largest STEP event in the world!

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, 2017. 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.

Now Accepting Entries for the 12th Annual STEP Private Client Awards 2017/18

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. This year's awards ceremony will be held on September 6, 2017 in London. For more information about the Private Client Awards and how to submit an entry, please visit www.steppca.org.

Ministry of Finance's New Online Submission Services for the Estate Information Return

There has been a change in filing options with the Ministry of Finance under the Estate Administration Tax Act, 1998. As you are aware, an Estate Information Return must be received by the Ministry of Finance within 90 days after a Certificate of Appointment of Estate Trustee has been issued. Thanks to valuable feedback from stakeholders, the Ministry of Finance has introduced a new online submission service that allows estate representatives (or their agents) to submit an Estate Information Return electronically. The online submission process is secure, accessible 24/7, free of charge, and provides an acknowledgement of receipt.

For more information, please visit Ontario.ca/estateadmintax, or go directly to the [Ontario Central Forms Repository](#), where you can download the PDF fillable form, the Estate Information Return Guide, as well as access the online submission service.

Family Enterprise Advisor (FEA) Program - Special Offer for STEP Members

TEP Testimonial:

"Before I took the program I mainly dealt with just the business owner, I didn't really probe into areas beyond my technical tax expertise. Now I have meaningful conversations with family members and I am able to identify non tax related issues that need to be considered."

- Kathy M. Munro, FCPA, FCA, FEA, TEP; PwC Partner, Tax



The FEA Program prepares advisors to handle the complexities inherent to business families. Take your advising expertise to a whole new level and become a trusted source of insight for your family enterprise clients. STEP members receive a 10% discount on the 2017 FEA Program, which starts this month in Toronto and Vancouver, and in May 2017 in Calgary.

For more information regarding the IFEA and the FEA Program, please visit ifea.ca/feap.

Next Upcoming Branch/Chapter Events

Ottawa Branch

February 15, 2017

[Common Complexities: There's no such thing as a "simple" estate](#)

Toronto Branch

February 15, 2017

[Life Insurance in Action – Tax and Planning Issues and Solutions](#)

Montreal Branch

February 16, 2017

[Trust and Estate Pot Pourri](#)

Calgary Branch

February 22, 2017

[The Complex Issues Surrounding Gifts and Loans to Adult Children](#)

Vancouver Branch

February 23, 2017

[Tips and Pitfalls of Probate Planning](#)

Atlantic Branch

March 9, 2017

[Joint Tenancy and Real Estate Issues in Estate Planning](#)

Saskatchewan Chapter

May 17, 2017

[US Tax and Estate Update](#)

Winnipeg Branch

February 21, 2017

[Powers of Attorney and Inherent Dangers of Ill-Advised Schemes](#)

Edmonton Branch

February 23, 2017

[Mediation vs. Litigation – CASE STUDY](#)

London Chapter

March 01, 2017

[Update on the 55\(2\) Intercorporate Dividend Experience to Date](#)

Okanagan Chapter

March 9, 2017

[Estate Planning for Clients Who Have a Disability and Their Families](#)

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