



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 conference 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.

- [Corporate Trust Specialist – Concentra Bank, Saskatoon, SK](#)
- [Trust Officer – Scotiabank, Vancouver, BC](#)
- [Wealth Planning Consultant \(Estate Planning Lawyer\) – Assante Private Client, Winnipeg, MB or Toronto, ON](#)

Education Center

French Education Initiatives

The first courses of both the Diploma Program and CETA are now open for registration. We are excited to be offering these courses with a civil law focus, and welcome new registrations and referrals as the translation continues. The first French Diploma exam, Droit des fiducies (Law of Trusts) will be held on May 14, 2018. The first French CETA exam, Cours de base en administration de successions et de fiducies (Foundations of Estate and Trust Administration), will take place on September 17, 2018. Please visit www.step.ca/french for more information, or contact education@step.ca.

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](#).



Visit www.step.ca/opportunity.aspx

We offer 30-day job postings, which can be viewed 24 hours a day, 7 days a week. Our [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 2,500 potential candidates. To learn more about this service, please [click here](#).

[Learn More](#)

Certificate in Estate and Trust Administration (CETA)

The next set of CETA exams (in English) are scheduled for March 5 and September 17, 2018. All students writing the March exam have been sent the online proctoring instructions. Please test your computer system prior to exam day. Should you have any issues, email education@step.ca.

Assessment by Exam

The next Diploma Program exam dates (in English) are scheduled for May 14 and November 26, 2018. Students are able to register and pay for diploma courses using our new [online registration](#) system. To register online, you will be prompted to create a STEP profile if you haven't already done so. We encourage students to visit the [student resources](#) section for additional study materials. If you require the course password, please email education@step.ca

Assessment by Essay

The next essay intake dates are May 1 and October 1, 2018. [Click here](#) for the pre-approved list of essay topics. Please review [essay requirements](#) before making a submission.

[Contact Education](#)

Early Bird Registration Now Open for the 20th 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. Early bird registration is now open, offering both members and non-members \$100 savings if registered before March 31st. Discounted student pricing is available to [active](#) students.

Visit our [national conference website](#) for more information!



"This conference is always an impressive congregation of the brightest tax minds with an unbelievable sharing of knowledge and ideas."

STEP CANADA 20TH NATIONAL CONFERENCE

MAY 28-29, 2018 | METRO TORONTO CONVENTION CENTRE
HOST HOTEL: DELTA TORONTO

REGISTRATION AND DETAILS

Hear from 2017 attendees **▶ PLAY VIDEO**

STEP
Canada
ADVISING FAMILIES ACROSS GENERATIONS

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, 2018.

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

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 2018 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. Visit family-enterprise-xchange.com/fea for details.



Upcoming 2018 FEA PROGRAMS | Calgary: May 28

To learn more, contact Peter Cotterill:
pcotterill@family-enterprise-xchange.com | 778.991.3365



TEP Testimonial:

"As much as the TEP designation identifies qualified trust and estate practitioners, the FEA designation is quickly becoming the standard in Canada to identify family enterprise advisory specialists. The FEA Program compels advisors to step back from their technical wheelhouse and provides critical context for advisors in their work with transgenerational family businesses."

- Cindy Radu, TEP, FEA | Partner BDO Canada LLP

Upcoming Branch & Chapter Events

For event details and registration, [click here](#) to access branch/chapter microsites.

Toronto Branch

Tuesday, February 13
Professional Liability Insurance –
The Common Errors

Montreal Branch

Thursday, February 15
Where's Grandma's Monet?
Advising Older Clients in
Succession Planning

Edmonton Branch

Thursday, February 22
Assisted Reproduction After Death

London & SWO Chapter

Wednesday, March 7
Cross Border Estate Planning

Atlantic Branch

Thursday, March 29
How the Philanthropic Universe is
Changing

Saskatchewan Chapter

Wednesday, May 23
Life Insurance Policy Transfers,
Implications of the 2016 Federal
Budget & Annual Chapter Meeting

Ottawa Branch

Wednesday, February 14
End of Life Care

Calgary Branch

Thursday, February 22
Tax & Insurance Funding -
Motivation Mishaps

Vancouver Branch

Thursday, March 1
Ten Ethical Dilemmas: A Multi-
Disciplinary Panel Discussion

Winnipeg Branch

Tuesday, March 20
Estate Planning Issues (Traps and
Tips – Capacity, Undue Influence
and Joint Assets)

Okanagan Chapter

Thursday, May 17
Wills Variation Actions & Annual
Chapter Meeting

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

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