



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.

[AVP, Estates & Trusts - Concentra Bank, Saskatoon, SK](#)

[Wealth Strategist - CIBC, Halifax, NS](#)

[Executive Trust Officer - CIBC, 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 chance to connect with qualified people. STEP

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

Both the French and Civil Law based Diploma Program and CETA Program are open for registration. For more information regarding our French programs and registration,

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

please visit <http://www.step.ca/french> or email Education - French Initiatives.

Certificate in Estate and Trust Administration (CETA)

The next exam date for CETA courses is scheduled for March 4th, 2019. Exam instructions and tutorial information were sent to all registered students. If you have not received this information, please contact education@step.ca.

Assessment by Exam (Diploma Program)

The next exam date is May 27, 2019. Exam location and instructions will be sent to students in April 2019.

Assessment by Essay

Revised essay topics for 2019 are now available on the [STEP Canada](#) website. The submission dates are May 1 and October 1, 2019. Essays are to be submitted with appropriate documentation to education@step.ca

Mentorship Program & Study Groups

STEP Canada's Volunteer Mentorship Program is grounded in STEP's ongoing mandate to advance practitioner knowledge. If you can dedicate two hours per month to help groom and foster relationships with the next generation of TEP members, please complete this [mentor survey](#) to apply. 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



21ST NATIONAL CONFERENCE



JUNE 6-7, 2019

METRO TORONTO CONVENTION CENTRE

Early Bird Registration Now Open!

STEP Canada's 21st National Conference is now open for registration! This two-day conference program features several sought-after international speakers who will speak to various relevant industry trends and developments. Additionally, the program is designed to meet the continuing education requirements for provincial law societies, accounting institutes and other professional associations by offering up to 10.75 hours of substantive CPD.

Early bird registration offers both members and non-members a \$100 savings if registered and paid before March 31st!

For more information or to register please visit our [national conference website](#).

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

[Register Now](#)

2019 STEP Canada Full-Day Course Succession of the Family Business

Upcoming Courses:

[February 19 - Ottawa](#)

[February 21 - Montreal](#)

[March 5 - Kelowna](#)

[March 7 - Vancouver](#)

[March 26 - Halifax](#)



Presented by: Cindy Radu, FCPA, FCA, LLB, LLM, ICD.D, FEA, TEP, Unbiased Financial Services Inc.; 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 ([Accreditation List](#))
- 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](#)

Upcoming Industry Events

STEP Canada will be participating at the events below this spring. We're excited to connect with industry professionals to discuss our routes to membership and the many benefits of a TEP designation. We look forward to seeing you there!

- March 14 - 16 | Quebec City | [Chambre des notaires | Cours de Perfectionnement du notariat](#)
- April 12 | Montreal | CAGP | [CAGP's 26th National Conference on Strategic Philanthropy](#)

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/>.

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](#)

Ottawa Branch

Wednesday, February 13
[Cross-Border Planning After the 2017 US Tax Cuts and Jobs Act](#)

Montreal Branch

Thursday, February 14
[Estate Planning with Life Insurance: Is It Still as Effective?](#)

Toronto Branch

Thursday, February 14
[Tax Update](#)

Calgary Branch

Tuesday, February 26
[Current Issues in Trust Planning](#)

Edmonton Branch

Thursday, February 28
[Post Mortem Administration Issues – Tax and Insolvency](#)

Southwestern Ontario Chapter

Wednesday, March 6
[Insurance Update](#)

Atlantic Branch

Thursday, April 4
[#isanyonereallywinning \(other than the lawyers\)?: Trends in Estate Litigation](#)

Vancouver Branch

Thursday, May 9
[So Your Clients Are Separating.... Implications to Their Wealth Planning & Annual Branch Meeting](#)

Saskatchewan Chapter

Wednesday, May 15
[2019 Tax Update](#)

Okanagan Chapter

Tuesday, May 14
[Protecting Clients from Their Children's Family Law Claims & Annual Chapter Meeting](#)

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