

STEP Canada Insider

E-Newsletter Vol. 4
Issue 1 - January 12, 2016



Happy New Year and 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.

Education Center

Graduates

Don't forget to submit your upgrade application form as soon as possible for full membership benefits.

Qualified Practitioner Route

Current Opportunities

[Associate Director, Gift & Estate Planning – The University of British Columbia, Vancouver](#)

[Development Officer, Gift & Estate Planning – The University of British Columbia, Vancouver](#)

[Estate & Trust Advisor – MD Financial Management, Saskatoon](#)

[Estate & Trust Advisor – TD Bank, Vancouver](#)

[Executive Trust Officer – TD Bank Group, Markham](#)

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

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

[Scotiabank Trust Officer – Scotiabank, Victoria](#)

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

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

[Learn More](#)

New essay topics have been published and are applicable for May 1, 2016 submissions onwards. Please click [here](#) to view a list of the new topics.

Certificate in Estate and Trust Administration (CETA)

The CETA2 online exam will take place on Monday, January 25, 2016.

2016 Education Calendar at a Glance

Jan 6	CETA2 tutorial
Jan 25	EXAM DAY for CETA2 students (online exam)
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)

[Contact Education](#)

STEP Canada Board Meets in London

The STEP Canada board of directors held its most recent meeting on December 8 in London, England, where they also attended the STEP Worldwide Leaders' Forum. The forum provided excellent opportunities to meet STEP leaders from around the globe, deepen relationships with them, and learn

from their ideas. The forum was focused on member services in a changing world. Discussions surrounded the STEP 2021 business plan and STEP's commitment to supporting members' lifelong learning, professional development, and career objectives.



STEP Canada Board of Directors meeting in London, counter-clock wise from top left: Geoff White, Pierre Kirouac, Kathryn Charr, Gail Black, Andrée Godbut, Rachel Blumenfeld, Chris Ireland, Michael Dodick, Timothy Grieve, Pamela Cross, Ruth March, H  l  ne Marquis, Christine Van Cauwenbergh  , Brian Cohen, Aileen La Borie, Michael Segal, Mike Bondy, Grace Chow, Kathleen Cunningham, Nancy Golding, John Poyser

In Case You Missed It

November 2015: STEP Journal — Interview with Michael Cadesky & Tim Grieve
[From Strength to Strength](#)

2016 National Conference – Send us your ideas!

The 2016 National Conference Program Committee **invites members to contribute to the conference content** by submitting session topic ideas; presentation proposals; and questions for the STEP Canada / CRA Round Table. In order to be considered, please send your ideas and proposed questions to jarmstrong@step.ca by **Friday, January 15, 2016**. STEP Canada's 18th National Conference will take place **Thursday and Friday, June 9 and 10, 2016** at the [Metro Toronto Convention Centre](#).

Regional Branch Programs 2016-17

STEP continues to deliver critical and relevant information essential to the trust and estate practice. [Click here](#) to view all upcoming 2016 branch and chapter events.

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 is Moving

The STEP Canada National Office is currently located in downtown Toronto. The office is moving uptown to Yonge and Sheppard on January 23.

As of January 25, 2016

STEP Canada national office address

45 Sheppard Avenue East, Suite 510

Toronto, ON M2N 5W9

Phone and fax numbers will remain the same.



2016 Upcoming Branch/Chapter Events

Okanagan

January 13, 2016

[Estate Freezes & Trusts: Surprise! Your Client has U.S. Citizenship/Property/Children](#)

Ottawa

January 13, 2016

[Update on Trust and Estate Law Cases and Review of Treatment of Foreign Assets Held in Estates and Trusts](#)

London

January 18, 2016

[The Intersection of Estate and Family Law](#)

Calgary

January 19, 2016

[Proper Planning in Complex Family Situations](#)

Winnipeg

January 19, 2016

[Testamentary Trust Tax Changes](#)

Montreal

January 20, 2016

[End of Life: Control of Dying and Disposition of Remains and Genetic Material](#)

Saskatchewan

January 20, 2016

[Estate Planning: Tips and Traps](#)

Toronto

January 20, 2016

[Probate Planning and Issues Arising from](#)

[Drafting and Litigating Secondary Wills](#)

Atlantic

January 21, 2016
[Family Trust Administration](#)

Vancouver

January 21, 2016
[2015 - The Year in Review and Wine and Cheese Reception](#)

Edmonton

January 28, 2016
[The Role of Mediations in Estate Practice](#)

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