STEP Canada Insider

E-Newsletter Vol. 5
Issue 01 - January 10, 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

- Associate - Estate Planning and Administration - Tax Group - BLG, Calgary, AB

Education Center

Congratulations Graduates!
Congratulations to all of our Diploma Program and Qualified Practitioner graduates from the fall 2016 term! Don't forget to submit your upgrade application form as soon as possible for full membership rights.

Certificate in Estate and Trust Administration (CETA)
The next CETA exams are scheduled for **March 6, 2017**. Please visit the CETA webpage and click on **How to Enrol** to register. Your registration includes access to all online course materials, a tutorial, and the exam.

Students who have successfully completed CETA3 are now able to register for the **CETA4**

- Director, Wealth Services - BMO Financial Group, London, ON
- Estate & Trust Consultant - Scotia Wealth Management, Vancouver, BC
- Executive Trust Officer - TD Wealth Private Trust, Mississauga, ON
- Partner - Estate and Business Planning - Tax Group - BLG, Calgary, AB
- Partner - Estate and Trust Planning, Litigation, and Administration - Tax Group - BLG, Calgary, AB
- Trust Manager - Scoita Wealth Management - Edmonton, AB

Visit our online job board any day of the week for the most up-to-date job postings.

Learn More

Certification Exam. Upon registration, students will be granted access to the *Certificate in Estate and Trust Administration - Certification Exam Study Guide*.

Diploma Program
All fall exam grades have been released to students. Students who passed courses 1 through 3 are invited to enrol in the next course of the diploma program, please complete the registration form and email it to education@step.ca. Congratulations to students who passed course 4, you have been sent an invitation to apply to upgrade to full, globally recognized, TEP designation.

The next exam dates for the Diploma Program are scheduled for **May 29** and **November 27, 2017.**

Qualified Practitioner Program
The next essay intake deadline is **May 1, 2017**. Topics are posted on the website.

Mentorship Program
STEP has launched Phase I (for Diploma Program) of the Volunteer Mentorship Program. Students expressing an interest in participating will be matched with a Full STEP Member holding the TEP designation in the new year. Any students who did not fill out the participation survey but are interested in having a mentor, please email education@step.ca

Contact Education

Happy New Year!
Wishing all of our members a happy 2017! We have a great year planned ahead, including a number of hot topical seminars lined up this winter and spring at a branch/chapter near you. Visit our Programs & Seminars page for the latest event listings.

Upcoming Branch Holiday Receptions
Celebrate the new year with fellow STEP members at your local branch/chapter social event. It's a wonderful way to meet and mingle with professionals in year area. Keep an eye on your inbox for the invitation. Upcoming social event details are listed below.

STEP Toronto's January Celebration Social Event
Date: January 16, 2017
Time: 5:00 pm - 7:00 pm
Location: First Canadian Pleace, BMO, 68th Floor, 100 King Street West, Toronto
Please click here to RSVP

STEP Montreal's Cocktails and Hors d'oeuvres Reception
Date: January 19, 2017
Time: 6:00 pm - 7:30 pm
Location: Royal Bank of Canada, 41st Floor, 1 Place de Ville Marie, Montreal
Please click here to RSVP

STEP Vancouver's Wine & Cheese Reception
Date: January 26, 2017
Time: 5:00 pm - 7:00 pm
Location: UBC Robson Square, Room C- 300, 800 Robson Street, Vancouver
Please click here to RSVP

STEP Atlantic's 3rd Annual Sparkling Reception
Date: May 25, 2017
Time: 5:00 pm - 7:00 pm
Location: Art Gallery of Nova Scotia, 1723 Hollis Street, Halifax
RSVP will open closer to the date

Congratulations RBC Wealth Management Estate & Trust Services!

Please join us in congratulating RBC Wealth Management Estate & Trust Services on being the very first Canadian organization to praticipate in our Canadian pilot launch of the Employee Partnership Program (EPP). RBC Wealth Managment Estate & Trust Services was recently approved as a Platinum Level Partner, the highest rating available.

For details about the program, please visit http://www.step.org/epp

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].

THE TOUR CONTINUES: STEP Canada National Full-Day Course – Canada/US Tax and Estate Planning: Cross-Border Issues

*** FOR LAW, ACCOUNTING, FINANCIAL PLANNING, AND INSURANCE PRACTITIONERS ***

The curriculum of this original course, which includes examples of actual perfected work product, is applicable to any practitioner with a practice in law; accounting; financial planning; or insurance. This course will equip attendees with a thorough description and understanding of all the relevant law and planning strategies they need to serve their clients with cross-border estate planning and US taxation issues, especially to enable them to identify these issues and the appropriate treatment.

Numerous practical examples and strategies are provided. Support materials include references to relevant statutes and regulations, IRS forms and instructions, secondary-source material, illustrative diagrams, and model documents.

Remaining tour dates:
Ottawa – January 26, 2017
Saskatoon – February 9, 2017

Keep an eye on your inbox for local course registration details, or visit our Programs & Seminars page for more information.

New Conference Registration Software!

Attendees of the 2017 National Conference will experience a new registration process. The new event management software, Cvent, will assist us in planning the largest STEP event in the world! We can't wait to see you on June 12 and 13 at the Metro Toronto Convention Centre. More conference details will be shared in the coming weeks.

Next Upcoming Branch/Chapter Events

London & Southwestern Ontario

January 11, 2017
A Potpourri of Legal and Tax Issues Resulting From Recent Legislation Changes

Ottawa

January 18, 2017
Multi-Jurisdictional Estate Planning

Saskatchewan

January 18, 2017
Gender Implications in Intergenerational Wealth Transfer

Toronto

January 18, 2017
Case Law & Potpourri of Trust Issues

Atlantic

January 19, 2017
Planning for Incorporated Professionals: A Multi-Disciplinary Panel

Montreal

January 19, 2017
Trust Issues; Practical Issues in Settling Estates + Cocktail Reception

Winnipeg

January 24, 2017
Post-Mortem Planning

Calgary

January 25, 2017
Tips, Traps and Select Issues in Trust Drafting and Administration

Edmonton

January 26, 2017
Conflict of Laws

Vancouver

January 26, 2017
2016 Year in Review + Wine & Cheese Reception

Okanagan

March 9, 2017
Estate Planning Tools for Disabled Persons and Their Families

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