



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.

- [Senior Canadian Tax Manager – Henderson Partners LLP, Oakville, 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 members receive a discounted rate to post on our [job board](#).

Education Center

French Education Initiatives

The first course of four, Law of Trusts (Droit des fiducies), included in the French Diploma Program, is now open for registration. The French CETA program is set to launch shortly. We are excited to be offering these new courses with a civil law focus. [Click here](#) for more information, or contact education@step.ca.

Certificate in Estate and Trust Administration (CETA)

The next set of exams are scheduled for March 5 and September 17, 2018. If you have received a passing mark on your latest exam and would like to register for the next CETA course, please do so [here](#). Further details on the exam tutorial and online proctoring instructions to test your system will be sent out in the coming weeks.



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](#)

Diploma Program

Exam marks from the November 27 exam are being distributed this week. The next exam dates 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. Please note, in order to register online, you will be required to create a STEP profile if you haven't already done so. [Click here](#) to register.

Qualified Practitioner Program

The next essay intake dates are May 1 and October 1. [Click here](#) for the pre-approved list of essay topics.

[Contact Education](#)

Happy New Year!

Wishing all of our members a happy 2018! We have a great year of events planned ahead. Visit our [Programs & Seminars](#) page for the latest information.

STEP Canada Full-Day Course Taxation at Death and Post Mortem Planning

ONLY 3 DATES LEFT IN THE TOUR

Presented by: *Chris Ireland, CPA, CA, TEP, Vancouver: PPI Advisory; Deputy Chair, STEP Canada*

This course reviews various tax and legal issues pertaining to post mortem planning for the ownership of private company shares and other taxation on death issues, specifically:

Taxation on death – an overview of the deeming rules; review of the various rollovers on death and the QSBC exemption; review of the rules pertaining to certain special assets – registered plans, rental real estate, principal residence; charitable donations; and a review of the various terminal returns.

Post mortem planning for private company shares – three case studies; illustrating the three levels of tax; overview of the post mortem planning alternatives (including the impact of the July 18, 2017 Federal Government proposals); a review of the Income Tax Act provisions that could apply; tax rate

considerations; general rules and planning considerations; detailed review of the case studies; hybrid planning and whether or not it is still possible; stop-loss rules; “short snappers” for the tax and legal considerations; review of a post mortem planning decision tree; and an overview of the reference materials. US content will be limited to issue identification and not a detailed review.

Registration fees include 6.50 technical hours of CPD; binder & USB of course materials; reference resources; refreshments and buffet lunch. Registration opens at 8:30 am; course begins at 9:00 am; course adjourns at 4:30 pm.

Exclusive to registrants of this course – specific areas of this course material affected by the final outcome of the July 18, 2017 Department of Finance consultation paper and draft legislation will be summarized with planning considerations in early-spring via webcast featuring Chris Ireland.

Coming to your area:

**Capacity is limited to 45 students.*

Date	Branch/Chapter	Location
September 14, 2017	Vancouver CONCLUDED	UBC Robson Square, Vancouver
September 19, 2017	Okanagan CONCLUDED	Hotel Eldorado, Kelowna
October 5, 2017	Atlantic CONCLUDED	Casino Nova Scotia, Halifax
October 26, 2017	Calgary CONCLUDED	The Ranchmen's Club, Calgary
November 15, 2017	Edmonton CONCLUDED	Royal Glenora Club, Edmonton
November 23, 2017	Saskatchewan CONCLUDED	Delta Bessborough, Saskatoon
December 5, 2017	Toronto CONCLUDED	Ivey Leadership Centre, Toronto
December 7, 2017	London & SWO CONCLUDED	Four Points by Sheraton, Cambridge
January 23, 2018	Montreal	Le Centre Sheraton Montréal
January 25, 2018	Ottawa	Rideau Club, Ottawa
February 1, 2018	Winnipeg	Fairmont Winnipeg, Winnipeg

[Register Now](#)

STEP Member \$495.00 + tax
Non-Member \$645.00 + tax

Canada/USA Live Webcast | US Tax Reform

Ruth March, Chair of STEP Canada and Katharine Davidson, Chair of STEP USA, are pleased to invite you to the very first Canada/USA joint webcast on **Friday, January 19th** discussing the **US Tax Reform**. Our panel of experienced US and Canadian practitioners will provide incisive and practical commentary, distilling the most sweeping rewrite of the US tax code in decades. Members will have an opportunity to submit questions to the panel during the online registration process.

Topics will include:

- A policy perspective – what is congress hoping to achieve
- An overview of important changes impacting those in the STEP community
- How these changes will affect Canada-US tax planning
- Strategies to implement

For details and registration, please click the button below. We look forward to your attendance.

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.



2018 FEA PROGRAMS

Toronto: January 25 | Vancouver: January 29 | 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

STEP/CRA Round Table Question Collection

The STEP/CRA Round Table Committee invites your questions for consideration at the next round table. Please submit your question(s) to STEProundtablequestions@step.ca.

20th National Conference 2018

Mark your calendars! STEP Canada's 20th National Conference is scheduled for Monday and Tuesday, May 28-29, 2018 at the Metro Toronto Convention Centre.

"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

SAVE THE DATES!
Registration & Details to Follow

Hear from 2017 attendees [▶ PLAY VIDEO](#)

STEP
Canada
ADVISING FAMILIES ACROSS GENERATIONS

Upcoming Branch & Chapter Events

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

London & SWO Chapter

Wednesday, January 10

Gifts and Loans to Children, Joint Property
Ownership Issues and Documentation

Montreal Branch

Thursday, January 11

Planning for Private Corporations and Trusts. The
new reality, based on the July 2017 federal
proposals and subsequent government
announcements
+ Seasonal Event

Okanagan Chapter

Thursday, January 11

Round Table Discussion: Share Attributes and
Valuation Issues – Practice in the BC Interior

Toronto Branch

Monday, January 15

January Holiday Celebration

Wednesday, January 17

Legal and Case Law Update

Winnipeg Branch

Tuesday, January 16

US Tax Update

Ottawa Branch

Wednesday, January 17

Philanthropy - Taxation and Best Practices

Saskatchewan Chapter

Wednesday, January 17

Tax and Non-Tax Considerations When Planning for
Dependent Children and Adults

Atlantic Branch

Thursday, January 18

Wealth Transfer for Business Succession

Calgary Branch

Wednesday, January 24

Case Law Update

Edmonton Branch

Thursday, January 25

Holistic HELP

Vancouver Branch

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Thursday, January 25

2017 Year in Review + Cocktail Reception

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

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