



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.

[Planning Services Consultant, - PPI, Toronto, ON](#)

[Sr. Tax, Retirement & Estate Planning Consultant – Manulife Financial, Waterloo, ON](#)

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

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

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

The third course *Testaments et administration de fiducies et successions* of the French Diploma Program is open for registration. For more information regarding our French programs and registration,

chance to connect with qualified people. STEP members receive a discounted rate to post on 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 will be sent to students in February 2019.

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

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

Courses Commencing This Month:

[January 8 - Calgary](#) *sold out*

[January 10 - Edmonton](#) *limited space remaining*

[January 29 - Winnipeg](#)

[January 31 - Saskatoon](#)



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 pending)
- 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



21ST NATIONAL CONFERENCE

JUNE 6-7, 2019
METRO TORONTO CONVENTION CENTRE



21st National Conference 2019

Mark your calendars and prepare to invest in yourself at STEP Canada's 21st National Conference. The two day conference program is designed to meet the continuing education requirements for provincial law societies and accounting Institutes/Orders, and other professional associations by offering 10.75 hours of substantive CPD.

In addition to the many industry-related organizations who will be on exhibition, attendees will have access to two full days of technical sessions, the robust STEP Canada native conference app, continental breakfasts, lunches and health breaks, take-away USBs loaded with session materials, an attractive conference delegate bag, and unparalleled networking opportunities.

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

2019 STEP/CRA Roundtable Question Collection

The STEP/CRA Roundtable Committee invites you to submit questions for consideration. If selected, your question(s) will be presented during the annual roundtable session at the 21st National Conference. Please submit your question(s) to STEProundtablequestions@step.ca.

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/>.



Wishing all of our members a happy and successful 2019! We have a great year of events planned ahead. Visit our [Programs & Seminars](#) page for the latest information and to register.

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.

Toronto Branch

Wednesday, January 9
[Strategic Philanthropy](#)

Okanagan Chapter

Monday, January 14
[Incorporating a Shareholders' Agreement into the Estate Plan and Related Insurance Needs](#)

Ottawa Branch

Wednesday, January 16
[Discretionary Trusts and Unique Estate-Planning and Administration Issues](#)

Montreal Branch

Thursday, January 17
[Changes for Private Corporations and Trusts – One Year Later, with Practical Applications](#)

Atlantic Branch

Thursday, January 24
[Wealth Planning: Current Tips and Traps in 2019](#)

Calgary Branch

Thursday, January 24
[Estate and Family Law: Mediation, Arbitration or Litigation?](#)

Edmonton Branch

Thursday, January 24
[Jointly Held Assets and Beneficiary Designations](#)

Vancouver Branch

Thursday, January 24
[2018 Year in Review & 20th Anniversary Sparkling Reception](#)

Saskatchewan Chapter

Monday, February 11
[Update on Philanthropy in Canada & Annual Chapter Meeting](#)

Winnipeg Branch

Tuesday, February 12
[US Tax Reform: The Fall-Out so Far for Individuals in Canada](#)

Southwestern Ontario Chapter

Wednesday, March 6
[Insurance Update](#)

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