

STEP Canada Insider

E-Newsletter Vol. 4
Issue 7 - July 12, 2016



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

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

[Personal Trust Officer – Concentra, Nanaimo, BC](#)

[Intermediate Wills, Estates and Trusts lawyer \(5+ year of call\) – Wilson Vukelich LLP, Markham, ON](#)

Education Center

Certificate in Estate and Trust Administration (CETA)

Congratulations to all students who successfully completed CETA1 and CETA2 on May 30! To register for your next exam, please visit the [CETA webpage](#).

The next exam date for CETA1, CETA2, and CETA3 students is scheduled for **September 19, 2016** (online exam).

Diploma Program

Good luck to all students who completed a Diploma Program exam on May 30th. You can expect to receive your marks **by late July** via email. STEP Canada and our Subject Matter Experts aim for accuracy and equity in exam marking.

To receive exam marks, students must be in

[ST Manager Philanthropic Advisory Services – Scotiabank, Vancouver, BC](#)



Visit our [online job board](#) any day of the week for the most up-to-date job postings.

[Learn More](#)

good standing as Affiliate or Technician members of STEP Canada, as such, annual fee balances must be up to date.

The next exam date for the Diploma Program is scheduled for **November 28, 2016** (paper-based exam). To register, please complete [this form](#).

Qualified Practitioner Program

The next essay intake deadline is **October 1, 2016**. Please view the list of [current approved essay topics](#). If you are submitting an essay, please ensure you have reviewed essay and submission guidelines.

Please contact education@step.ca for more information on STEP's education programs.

[Contact Education](#)

STEP Canada Presents its 2016-17 Board of Directors

STEP Canada was pleased to announce the 2016-17 Board of Directors in the June 22 Report on Business, Globe & Mail. An electronic copy of the notice can be viewed [here](#).

The aims of the Society of Trust and Estate Practitioners (STEP) include raising the public profile of professional trust and estate workers. STEP members must meet rigorous educational standards and engage in continuing professional development to hold the trust and estate practitioner (TEP) designation. Currently, there are 1,834 TEPs in Canada, and another 529 professionals who are enrolled in STEP's domestic education program and working toward their TEP designation. Worldwide, STEP has 20,000 members in 95 countries.

STEP's members work with families and family businesses, helping them with estate and succession planning, both domestically and internationally, while protecting the interests of their spouses, children, and elderly or vulnerable relatives. Today, many families are spread across the globe. Estate plans must therefore comply with the tax and succession laws of various jurisdictions to ensure that estates and family businesses pass safely from one generation to the next.

STEP's national board and committees assume a leading role in communicating the views of STEP's members to governments, tax authorities, regulators, and the public. All over the world, STEP works with governments and regulatory authorities to examine the probable effects of proposed changes in the law, provide technical advice and support, and respond to requests for consultations.

 Timothy Grieve LLB, TEP National Chair, Merovitz Potekin LLP, Ottawa	 Pamela Cross LLB, TEP National Deputy Chair, Borden Ladner Gervais LLP, Ottawa	 Ruth March CPA, CA, TEP National Deputy Chair, KPMG LLP, Halifax	 Chris Ireland CPA, CA, TEP National Treasurer, PPI Advisory, Vancouver	 Rachel Blumenfeld LLB, TEP National Secretary, Miller Thomson LLP, Toronto	 Ian Worland LLB, TEP National Past Chair, Legacy Tax + Trust Lawyers, Vancouver	 Richard Niedermayer LLB, TEP Director at Large, Stewart McKelvey, Halifax	 Christine Van Cauwenbergh CFP, LLB, TEP Director at Large, Investors Group, Winnipeg
 Gail Black QC, TEP Calgary Branch Chair, Miller Thomson LLP	 Patricia Carver CPA, CA, CFP, TEP Winnipeg Branch Chair, Great-West Life	 Kathryn Charr MTI, TEP Edmonton Branch Chair, TD Wealth Private Client Group	 Brian Cohen LLB, TEP Toronto Branch Chair, Dentons Canada LLP	 Daniel Frajman BCL, LLB, TEP Montreal Branch Chair, Spiegel Sohrner	 Andrée Godbout LLM, TEP Atlantic Branch Chair, BMO Wealth Management	 Aileen La Borie LLB, TEP Vancouver Branch Chair, BDO Wealth Management	 Zoran Vranjkovic CPA, CA, TEP Ottawa Branch Chair, Welch LLP

Digital Assets Working Group (DAWG)'s New Guide to Understanding Digital Assets

The STEP Worldwide Digital Assets Working Group was established to address emerging issues for STEP practitioners, provide learning and resources, and campaign for greater clarity and uniformity in international laws, and the terms and conditions of internet service providers. [Click here](#) to view

the newly published Digital Assets Guide for key information on what's considered a digital asset and why they're so important.

Keep up-to-date on the latest developments in digital assets by visiting DAWG's newly launched [webpage](#).

Family Enterprise Advisor (FEA) Program - Special Offer for STEP Members

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 in January 2017 in Toronto and Vancouver, and in May 2017 in Calgary.

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

For more information regarding the IFEA and the FEA Program, please visit ifea.ca/feap.

STEP Private Client Awards – Finalists Announced!

The STEP Private Client Awards are seen as the hallmark of quality within the private client industry. Open globally to both STEP members and non-members, these prestigious awards recognize and celebrate excellence in the industry. All entries undergo a rigorous judging process with up to five finalists in each category. Judges are supported by an independent panel of experts, comprised of internationally renowned practitioners in wealth management. The Awards will be presented in London on September 8, 2016. The [list of finalists](#) is available for public viewing, including three Canadian nomination finalists! For more information on the Private Client Awards, please visit www.steppca.org.

STEP's CPD Policy

STEP Worldwide has produced an informative [video](#) for members, outlining the guidelines of the new CPD policy. We encourage members to set aside a few minutes to review the video linked below. For further questions, please contact cpd@step.org.

All resources mentioned in the video can be found on the STEP Worldwide website in the [CPD centre](#). You will need your STEP Worldwide username and password to access the materials. For login assistance, please contact memberservices@step.ca.



2016 Upcoming Branch/Chapter Events

<p>Toronto September 14 Disability Planning</p>	<p>Montreal September 15, 2016 TBA</p>
<p>Saskatchewan September 15 Pecore vs Pecore – 9 Years Later</p>	<p>Ottawa September 21, 2016 TBA</p>
<p>Edmonton September 22, 2016 TBA</p>	<p>Okanagan September 22, 2016 Practical Issues of Settling a Trust</p>
<p>Vancouver October 6, 2016 Seminar & Welcome Back Cocktails</p>	<p>Atlantic TBA</p>
<p>Calgary TBA</p>	<p>London & Southwestern Ontario TBA</p>
<p>Winnipeg TBA</p>	<p>Return to Top</p>

Contact Us | Phone: 416-491-4949 ext.221 | www.step.ca

[Click to view this email in a browser](#)

If you no longer wish to receive ANY emails from STEP Canada, please reply to this message with "Unsubscribe" in the subject line or simply click on the following link: [Unsubscribe](#)

[Click here](#) to forward this email to a friend

STEP Canada
45 Sheppard Avenue East
Suite 510
Toronto, Ontario M2N 5W9
CA