

STEP Canada Insider

E-Newsletter Vol. 5
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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 and Trust Consultant – Scotia Wealth Management, Barrie, ON](#)

Education Center

French Education Initiatives – LAUNCH!

The CETA and Diploma programs will launch the first French language courses with a civil law focus this fall for exams in March and May 2018, respectively. Contact education@step.ca for more details.

Certificate in Estate and Trust Administration (CETA)

Registration is open for the next set of CETA exams, scheduled for **September 18, 2017**. The registration deadline is July 18, 2017. Please [click here](#) to enrol. CETA2-2nd Edition, which

- [National Manager, Regulatory & Fiduciary Oversight – Scotiabank, Toronto](#)
- [Senior Trust & Estate Advisor – National Bank, Toronto, ON](#)
- [Tax and Estate Planning Practitioner \(Lawyer or Accountant\) – Assante Wealth Management, Winnipeg, MB](#)
- [Trust Administrator – Caledon Trust, Toronto, ON](#)



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

[Learn More](#)

incorporates the Quebec law (in English) is now available.

Diploma Program

The next set of exams will be held on November 27, 2017 (in English). To register for your exam, please click [here](#).

Qualified Practitioner Program

The next essay intake date is October 1, 2017. Essay topics must be selected from the pre-approved list of topics on the STEP Canada [website](#).

Annual Student Reception & Awards Presentation

Thank you to all the students who made it out to the Student Reception and Awards Presentation at the National Conference. It was a wonderful opportunity to meet face to face, and to celebrate STEP's most successful students.



[Contact Education](#)

STEP Canada Presents its 2017-18 Board of Directors

STEP Canada was pleased to announce the 2017-18 Board of Directors, as published in the June 22nd Report on Business, Globe & Mail newspaper. An electronic copy of the notice can be viewed [here](#) and below.



STEP Canada Presents Its 2017-18 Board of Directors

The Society of Trust and Estate Practitioners (STEP) is committed to raising the public profile of professionals working in the trust and estate field. 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 1,809 TEPs in Canada, and another 677 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.

 <p>Ruth March CPA, CA, TEP National Chair, KPMG LLP, Halifax</p>	 <p>Pamela Cross LLB, TEP National Deputy Chair, Borden Ladner Gervais LLP, Ottawa</p>	 <p>Chris Ireland CPA, CA, TEP National Deputy Chair, PPI Advisory, Vancouver</p>	 <p>Christine Van Cauwenberghe CFP, LLB, TEP National Treasurer, Investors Group, Winnipeg</p>	 <p>Rachel Blumenfeld LLB, TEP National Secretary, Aird & Beris LLP, Toronto</p>	 <p>Timothy Grieve LLB, TEP National Past Chair, Merovitz Potechin LLP, Ottawa</p>
 <p>Brian Cohen LLB, TEP Director at Large, Gowling WLG LLP, Toronto</p>	 <p>Aileen La Borie LLB, TEP Director at Large, RBC Wealth Management, Vancouver</p>	 <p>Richard Niedermayer LLB, TEP Director at Large, Stewart McKelvey, Halifax</p>	 <p>Litza Anderson LLB, TEP Vancouver Branch Chair, Scotia Wealth Management</p>	 <p>Sangita Bhalla LLB, TEP Winnipeg Branch Chair, RBC Wealth Management</p>	 <p>Sarah Dykema LLB, TEP Atlantic Branch Chair, Molnes Cooper</p>
 <p>Daniel Frajman BCL, LLB, TEP Montreal Branch Chair, Spiegel Sohrmer Attorneys</p>	 <p>Kathy Hawkesworth LLB, TEP Edmonton Branch Chair, Edmonton Community Foundation</p>	 <p>Vance LeCocq CPA, CA, TEP Calgary Branch Chair, Strategy Wealth Advisors</p>	 <p>Edward Polci CLU, TEP Toronto Branch Chair, First York Insurance</p>	 <p>Zoran Vranjkovic CPA, CA, CFP, TEP Ottawa Branch Chair, Welch LLP</p>	

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STEP Canada's 19th National Conference - A Great Success!

Click the video below to hear what our attendees had to say about STEP Canada's 2017 19th National Conference.



STEP Canada's 19th National Conference 2017

STEP Canada

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 to STEProundtablequestions@step.ca.

12th Annual STEP Private Client Awards - Finalists Announced!

The 2017-18 finalists have been announced and the list is now available for [public viewing](#)! Winners will be revealed at the Private Client Awards ceremony on September 6, 2017, at the Park Plaza Westminster Bridge Hotel in London. If you're planning to attend, please be sure to [book a table](#)! The judges have shortlisted five practitioners for the Trusted Advisor of the Year 2017/18 award, and we're inviting you to [vote](#) for the winner of this prestigious category.

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. For more information about the Private Client Awards and how to purchase tickets, please visit www.steppca.org.

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

The course will review 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; and a review of the various terminal returns.

Post mortem planning for private company shares - two case studies; illustrating the three levels of tax; overview of the post mortem planning alternatives; 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; 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 7.0 technical hours of CPD; binder & USB of course materials; reference resources; refreshments and lunch.

STEP Member	\$495.00
Not a STEP Member	\$645.00

Capacity limited to 45 students. Registration will open shortly.

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

Coming to your area:

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

Upcoming Branch/Chapter Events

STEP branches and chapters are in the process of planning the 2017-18 education season. Seminar details including, dates, topics, and speakers will become available in the coming months. Registration will open shortly.

Next Upcoming Branch/Chapter Events

Toronto Branch

September 13, 2017

Intersection of Family, Tax and Estate Law

Winnipeg Branch

September 19, 2017

**proposed date*
Millennials and Advice

Saskatchewan Branch

September 20, 2017

2017 Tax Update

Edmonton Branch

September 21, 2017

Private Lives and Death –
Juggling Client Privacy with Family Inclusion

Vancouver Branch**October 26, 2017**

Important Recent Changes
Affecting Small Business and
Professional Corporations and
Wine & Beer Reception

Okanagan Chapter**November 22, 2017**

Multiple Will Planning for
Individuals with Private Company
Shares

Atlantic Branch**November 23, 2017**

Practical Guidance for Trust
Administration

Calgary Branch**TBA**

*Program and passport details
available at a later date.*

London & Southwestern Ontario**October 11, 2017***TBA***Montreal Branch****September 14, 2017**

Trust & Estates Valuation in Light
of Recent Case-Law

Ottawa Branch**TBA**

*Program and passport details
available at a later date.*

[Return to Top](#)

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