



## 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

### Current Career Opportunities

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

[Private Client Services/Social Impact Associate - Miller Thomson, Montreal, QC](#)

[Senior Trust Advisor – RBC Wealth Management, Edmonton, AB](#)

[Tax Lawyer – Minden Gross LLP, Toronto, ON](#)

[Trust Officer – Legacy Private Trust, Toronto, ON](#)

## Education Center

### Exam Sittings & Essay Intake Dates

Education Program	Exam/Essay Dates
CETA	September 17, 2018 March 4, 2019
Assessment by Exam (Diploma Program)	November 5, 2018 May 13, 2019
Assessment by Essay	October 1, 2018 May 1, 2019

### French Education Initiatives

The French language CETA and Diploma programs are open for registration. For more

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](#).



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](#)

[Contact Education](#)

information regarding our French programs, please visit [www.step.ca/french](http://www.step.ca/french).

### Certificate in Estate and Trust Administration (CETA)

To register for an upcoming CETA exam, [click here](#).

### Assessment by Exam

We are now accepting registrations for the November 5 and May 13 exam sittings. To register for the English (common law) exam, [click here](#). To register for the French (civil law) exam, [click here](#).

### Assessment by Essay

[Click here](#) for the October 1 pre-approved list of essay topics. Please email [education@step.ca](mailto:education@step.ca) if you have questions regarding your essay submission.

### Mentorship Program

Phase III of the national mentorship program has now launched for the CETA program. The Assessment by Exam (Phase I) and Assessment by Essay (Phase II) mentorship programs are ongoing. All students interested in having a TEP mentor can email [education@step.ca](mailto:education@step.ca).

## Have a Happy & Safe Summer!

STEP Canada wishes everyone a happy and safe summer season. Be sure to stay hydrated and slather on sunscreen while you're enjoying the beautiful weather. STEP Canada is gearing up for another great program season ahead and will be releasing branch/chapter seminar and passport details in the coming weeks.



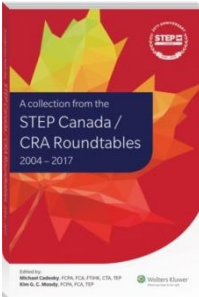
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## STEP Canada's 20th National Conference

STEP Canada's 20th National Conference was a truly memorable experience, one we want to share! We've created a short video capturing event highlights, special moments, and delegate commentary. Click the button below to see the compilation and hear what attendees had to say!

▶ **PLAY VIDEO**

## 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/>.

## STEP Global Congress 2018

**Early Bird Rate closes July 16, 2018 - [Book now](#) to avoid disappointment!**

The third Global Congress will take place on September 13-14, 2018 in Vancouver, Canada. This follows on from a sell-out second Global Congress in Amsterdam in 2016 and our inaugural Global Congress in Miami, USA in November 2014. The 2018 Congress promises to be another must-attend event in a STEP member's calendar! [Click here](#) for more information.

**STEP GLOBAL CONGRESS**

- **50 speakers**
- **10 networking opportunities**
- **Global, high-level attendees**

**13-14 Sept, Vancouver**

**Register by  
16 July 2018 for  
the Early Bird Rate**

## STEP Referral Rewards

Help expand the STEP network! According to the 2017 STEP Members' Satisfaction Survey, 97% of STEP members would recommend STEP to a colleague. When you recommend a colleague, you will be entered into a prize draw to win an iPad. All you need to do is [login](#) to your STEP Worldwide account and complete the member referral form. STEP will provide your colleague with all the information needed to join.

Visit <https://www.step.org/recommend-colleague> for more information.

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## Upcoming Branch & Chapter Events

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

### **Montreal Branch**

Thursday, September 6  
LIRAs, LIFs and Locked-In RRSPs  
Following Death in Quebec

### **Winnipeg Branch**

Tuesday, September 18  
TOSI

### **Vancouver Branch**

Thursday, September 20  
Implications of Offshore Trusts for  
Domestic Clients: The Why, What, How of  
Your Client's Offshore Trusts

### **Calgary Branch**

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

### **Okanagan Chapter**

*Program details available at a later date.*

### **Saskatchewan Chapter**

*Program details available at a later date.*

### **Toronto Branch**

Thursday, September 13  
Tax Planning for Private Corporations -  
What's Left?

### **Edmonton Branch**

Thursday, September 20  
Blended Families and Matrimonial Issues  
in Estate Planning

### **Atlantic Branch**

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

### **London Chapter**

*Program details available at a later date.*

### **Ottawa Branch**

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

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