

STEP Canada Insider

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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

- [National Manager, Regulatory & Fiduciary Oversight – Scotiabank, Toronto](#)
- [Trust Administrator – Caledon Trust, Toronto, ON](#)
- [Wealth Strategist – CIBC, Prairies, Alberta, Southwest Ontario](#)

Education Center

French Education Initiatives – LAUNCH!

The Education department is pleased announce the upcoming launch of new French language education initiatives created specifically for students for whom civil law is most relevant. Both the CETA and Diploma programs will launch this fall for exams in March and May 2018, respectively. New courses are scheduled to roll out every six months. 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 incorporates the Quebec law (in English), will be released this week.

Diploma Program

All exam marks will be distributed to students who wrote their May 29th exam by late June or early July. The next set of scheduled exams are



November 27, 2017. To register for your next exam, please click [here](#).

Qualified Practitioner Program

Students who submitted their essays for the May 1st intake will be sent their marks by the end of this month. The next essay intake date is October 1, 2017. Essay topics must be selected from the pre-approved list of topics on the [website](#).

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

[Learn More](#)

Annual Student Reception & Awards Presentation

Thank you to all the students who made it out to the Student Receptions and Awards Presentation yesterday. It was a fantastic evening!

[Contact Education](#)

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

It's day 2 of STEP Canada's 19th National Conference. The event has been a great success, with a record-breaking attendance of over 720 registrants! A big thank you to all attendees, sponsors, speakers, and moderators. You have made year's event truly top-notch. Apart from the full technical program, some highlights from the conference include last night's social event at the Fairmont Royal York Concert Hall (sponsored by RBC), which sold out at 400 guests. The evening offered a relaxing networking reception followed by a sit down dinner. Today's awards luncheon was another memorable meal, and an opportunity to acknowledge participation within the STEP organization. Congratulations to Tim Grieve, winner of the Michael Cadesky Volunteer of the Year Award!

Mark your Calendars for STEP Canada's 20th National Conference, scheduled for May 28-29, 2018 at the Metro Toronto Convention Centre in Toronto.

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 2017/18

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. This year's awards ceremony will be held on **September 6, 2017** in **London, England**. For more information about the Private Client Awards and how to purchase tickets, please visit www.stepcca.org.

Upcoming Branch/Chapter Events

STEP branches and chapters are in the process of planning the 2017-18 education season. Seminar dates, topics, and speakers will be added to the STEP Canada website in the coming months.

Next Upcoming Branch/Chapter Events

Atlantic Branch

Program and passport details

Calgary Branch

Program and passport details

available at a later date.

Edmonton Branch

Program and passport details available at a later date.

Ottawa Branch

Program and passport details available at a later date.

Okanagan Chapter

Program details available at a later date.

Toronto Branch

Program and passport details available at a later date.

Winnipeg Branch

Program and passport details available at a later date.

available at a later date.

Montreal Branch

Program and passport details available at a later date.

London & Southwestern Ontario Chapter

Program details available at a later date.

Saskatchewan Chapter

Program details available at a later date.

Vancouver Branch

Program details available at a later date.

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