



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.

[Estate Litigation Lawyer – WEL Partners, Toronto, ON](#)

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

[Trust Administrator – Solus Trust Company Limited, Vancouver, BC](#)

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

Trust Officer – Legacy Private Trust, Toronto, ON

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](#)

programs are open for registration. For more information regarding our French programs, please visit www.step.ca/french.

Certificate in Estate and Trust Administration (CETA)

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

Assessment by Exam

Diploma Program exams are in the process of being marked. Grades will be distributed to students within the next week. 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

The May 1 essay submissions have just finished being marked. Grades will be distributed to students this week. [Click here](#) for the October 1 pre-approved list of essay topics. Please email 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. CETA students interested in having a TEP mentor can email education@step.ca. The Assessment by Exam (Phase I) and Assessment by Essay (Phase II) mentorship programs are ongoing.

[Contact Education](#)

STEP Canada's 20th National Conference

The 20th National Conference was a great success thanks to our sponsors, speakers, moderators and the incredible support from practitioners across the country. Once again, the previous year's attendance record was surpassed by almost 70 registrants, with a total of 787 delegates at the conference. Thank you to our generous sponsors who helped to make STEP Canada's 20th an unforgettable event. Thank you to our speakers and moderators for sharing your incredible knowledge and expertise.

The black-tie gala was a truly special evening. The dinner sold out with close to 500 guests. Some highlights from the event include a cocktail reception with a sunset view of the Toronto skyline, a

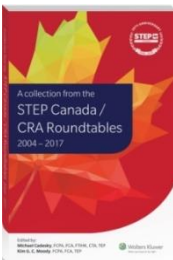
series of videos which captured the evolution of STEP Canada over the past 20 years, and some comedic entertainment from Canada's very own, Jonny Harris.

Congratulations to our volunteer award winners who so generously donate their time and skills to help grow the organization. A special congratulations to the 2018 Volunteer of the Year Award recipient, Rachel Blumenfeld.

Thank you to those who attended the annual student reception. It was a great celebration of student achievement and an opportunity to network with STEP executives. Congratulations to the 2017 award winners for demonstrating excellence in the pursuit of STEP education and the TEP designation.

Mark your calendar! You can look forward to STEP Canada's 21st National Conference, scheduled for Thursday, June 6 - Friday, June 7, 2019. We hope to see you next year for another great event!

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 Canada Press & Brand Awareness

The 2018-19 Board of Directors appointment notice hit news stands on June 6th. The notice was featured in the Report on Business section of the Globe and Mail newspaper. In case you missed it, we've linked a PDF version of the advertisement [here](#). Creating a greater public understanding of STEP and the Trust and Estate Practitioner (TEP) designation is an important and continuous effort. Please share this exciting announcement with fellow practitioners.



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.

Upcoming Branch & Chapter Events

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

Montreal Branch

Thursday, June 14
[Recap of STEP Canada's 20th National Conference](#)

Toronto Branch

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

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.

Winnipeg Branch

Thursday, June 14
[Annual Branch Meeting & Student Luncheon](#)

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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