

STEP Canada Insider

E-Newsletter Vol. 4
Issue 3 - March 8, 2016



Welcome to the STEP Canada Insider!

With access to the monthly STEP Insider, readers will receive the latest news about branch/chapter activity, national conference updates, practitioner opportunities, education, and more!

Next Scheduled Branch/Chapter Events

[Click here to see YOUR next regional branch/chapter event](#)

Career Advertising with the Help of STEP Canada

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. Since the launch of this service in 2013, we have worked with over 50 firms across the country to promote nearly 100 career opportunities. STEP members receive a discounted rate to post on our job board. To learn more about this service, please [click here](#).



Practitioner Opportunities

Current Opportunities

[Consultant, Estates Solutions Centre – CIBC, Toronto](#)

[Estate & Trust Advisor – TD, Calgary](#)

[Executive Trust Officer/Trust Officer – TD](#)

Education Center

Graduates

Please remember to submit your upgrade application form for full membership benefits.

Qualified Practitioner Route

The next submission date for essays is May 1, 2016. New essay topics have been published and are in effect for the May 1 submission

[Wealth Management, Vancouver](#)

[Trust Officer, Charitable Foundation Services – Scotiabank, Toronto](#)

[Vice-President & Regional Director, Trust Services, Eastern Canada – BMO Private Banking, Montreal](#)

[Wills & Estates Law Clerk – Beard Winter Lawyers LLP, Toronto](#)

[Learn More](#)

Visit the [STEP Canada website](#) for details on our 18th national conference, important industry news, and 2016 branch/chapter events



onwards. Please click [here](#) to view a list of the new topics and review the essay guidelines.

2016 Education Calendar at a Glance

Mar 28	Diploma Program: Trust and Estate Planning course assignment #1 due (mandatory for May exam students)
Apr 28	Diploma Program: Trust and Estate Planning course assignment #2 due (mandatory for May exam students)
May 1	QP essay submission due Click here to view the new list of essay topics
May 30	EXAM DAY for Diploma students (paper-based), CETA1 and CETA2 students (online)

[Contact Education](#)

Early Bird Registration Now Available for 18th National Conference - June 9-10, 2016

Early-bird registration offers a \$100 savings to those who register before March 31! The conference has established itself as a must-attend event for domestic and international practitioners, offering unsurpassed networking and continuing education opportunities. [Click here](#) for details and registration. To hear from our 2015 attendees, watch this [video](#) highlighting last year's event.



Preliminary Program now available! The [Preliminary Program](#) is now available on the STEP Canada website, outlining the many sessions that will be taking place at the conference.

Look forward to our June 9 keynote speaker! Dr. [Michael Gordon](#) is one of Canada's pre-eminent geriatric physicians. His luncheon presentation, *Parenting Your Parents: In Search of the Elusive GPS*, will offer attendees insightful reflections and advice on facing this special family crisis.

2016 Federal Budget & Legislative Proposals - Live Complimentary Webcast

STEP Canada is offering a 75-minute complimentary interactive webcast to members on Thursday, March 31. [Register here](#) to gain thoughtful insights and reflections from our distinguished panel of experts as they discuss the March 22, 2016 Federal Budget. Our panellists will emphasize the most important highlights in the budget relating to the trust and estate practice, and will provide practitioners with valuable and practical recommendations that they can take back to their clients. The session will also include an update on the January 15, 2016 legislative proposals addressing some of the concerns raised by STEP Canada and other industry groups, in connection with the new life interest trust rules and charitable donation rules. The live presentation will be taking place in Toronto.

Membership Renewal

STEP Canada has begun its annual membership renewal campaign. Notification letters were sent to all members via Canada Post early last week. These letters are friendly reminders that membership fees are due as of April 1, 2016. STEP continues to deliver opportunities of unparalleled education, representation and networking to members. We look forward to another successful year and thank you for your continued support.

11th Annual STEP Private Client Awards 2016/17

The [STEP Private Client Awards](#) provides practitioners and their firms an opportunity to demonstrate excellence to their peer groups and clients. Now in its 11th year, this prestigious award ceremony highlights eminence among private client solicitors, lawyers, accountants, barristers, bankers, trust managers and financial advisors. The Awards are open to both STEP members and non-members. Recognition at the STEP Private Client Awards serves as an endorsement of your team, your firm and Canada as a jurisdiction. Entries are open until **April 29, 2016** and will be assessed by an independent panel of expert judges. [Click here](#) to view the 15 global award categories. For full criteria and information on how to enter, please visit www.steppca.org

In Case You Missed It

eNews - February 26, 2016 – STEP Canada Tax Technical Committee
[Legislative Proposals on the Tax Rules for Certain Trusts and Their Beneficiaries](#)

Certificate in Estate and Trust Administration

STEP's self-study online CETA program is of value to individuals who want to start or advance their career, and to employers who want to seize the many business opportunities resulting from today's changing demographics. Organizations staffed by knowledgeable estate administrators and trust officers who can skillfully manage this changing market will attract new clients and business prospects. [Click here](#) to learn why so many individuals have enrolled in this educational offering. The first course of the four courses in the CETA program, *CETA1: Foundations of Estate and Trust Administration*, now qualifies for 30 continuing education (CE) credits, accredited by the [Institute of Advanced Financial Education](#) (IAFE).

STEP Canada has partnered with [Advocis](#) to promote the CETA1 course offering to Advocis members.

2016 Upcoming Branch/Chapter Events

Ottawa

March 9
[Effective Use of Insurance in Estate Planning](#)

Montreal

March 17
[Recent Case Law Review \(Civil Law\) and Other Matters of Interest \(Wills, Trusts and Estates\)](#)

Edmonton

March 24
[Attention to Cultural Values and Differences in Estate Practice](#)

Vancouver

April 14
[Registered Assets at Death \(Planning Beyond the Beneficiary Designation\)](#)

Saskatchewan

May 11
[US Tax Planning](#)

Okanagan

June 8
[Practice Points for an Ageing Population](#)

Winnipeg

March 15
[Challenges in Building Wealth for First Nations](#)

Calgary

March 23
[Private Company Business Planning / Structuring Part II](#)

Toronto

April 13
[Insurance in Estates and Trusts](#)

Atlantic

May 5
[Sparkling Reception and Annual Branch Meeting](#)

London

May 18
[TBA](#)

[Return to Top](#)

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