

## 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

- [Estate and Trust Consultant – Scotia Wealth Management, Toronto, ON](#)
- [Private Trust Manager, Producing – TD.](#)

### Education Center

Congratulations to the following students who have achieved academic excellence in 2016. These students will be featured in the May 2017 edition of STEP Inside and the awards will be presented during the National Conference at our special Student Reception.

**Highest Mark in Law of Trusts:** Dwight Dee, Miller Thomson LLP, STEP Vancouver branch

**Highest Mark in Taxation of Trusts and Estates:** Martina Zanetti, Pawson Law, STEP Vancouver branch

**Highest Mark in Wills, Trust and Estate Administration:** Denese Espeut-Post, Avery Law Office, STEP Okanagan chapter

## [Kelowna, BC](#)

- [Senior Advisor and Trust Officer, Trust and Advisory Services NBF/Natcan Trust – National Bank, Winnipeg, MB](#)
- [Senior Trust and Estate Officer – Cidel, Calgary, AB](#)
- [Trust Officer – Scotia Wealth Management, Vancouver, BC](#)
- [Trust Officer Indigenous Trust Services – TD Canada Trust, Winnipeg, MB](#)



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

[Learn More](#)

**Highest Mark in Trust and Estate Planning:**  
Meghan Davis, Collins Blay LLP, STEP Ottawa branch

**Highest Mark in a Qualified Practitioner Essay:** Soheyl Hemati, HMS LLP, STEP Toronto branch

**Gerald W. Owen Book Prize; Highest Overall Average Across All Four Diploma Courses:**  
Becky Turcotte, The Millar Corporation, STEP Ottawa branch and Meghan Davis, Collins Blay LLP, STEP Ottawa branch

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

All exams are in process for grading; STEP will share results with students for the CETA1 exams within 2 weeks and within 6-8 weeks for CETA 2-4. The next exams are scheduled for **September 18, 2017**.

## **Diploma Program**

The next Diploma Program exams are scheduled for **May 29, 2017** and **November 27, 2017**. To register for the next course, please complete the [registration form](#) and email it to [education@step.ca](mailto:education@step.ca).

## **Qualified Practitioner Program**

The next essay intake deadline is **May 1, 2017**. Topics are posted on the [website](#).

[Contact Education](#)

## **Early Bird Registration Now Available for 19th National Conference**

The STEP Canada national conference has established itself as a must-attend event for domestic and international practitioners, offering unsurpassed networking and continuing education opportunities. The 19th National Conference is taking place on **Monday, June 12 - Tuesday, June 13, 2017** at the **Metro Toronto Convention Centre**. Early-bird registration is now open. Members and non-members will save \$100 if registered before March 31st! Visit the [event website](#) for more information.

## **New Conference Registration Software!**

Attendees of the 2017 National Conference will experience a new registration process this year. The event management software, Cvent, will assist us in planning the largest STEP event in the world! Visit the [event website](#) to register.

## 2017 Federal Budget Live Webcast - Complimentary for STEP members!

We are pleased to announce a 2017 Federal Budget Live Webcast will take place on **Friday, March 31, 2017**. STEP members are invited to attend this complimentary 75-minute live interactive webcast to hear thoughtful insights and reflections from our distinguished panel of experts as they discuss the 2017 Federal Budget. Our panellists will emphasize the most important highlights in the Budget in relation to trust and estate practice, and will provide practitioners with valuable and practical recommendations they can take back to their clients. The session will also include an update on the October 13th, 2016 legislative proposals; addressing some of the concerns raised by STEP Canada in connection with the exemption from capital gains tax on the sale of a principal residence.

[Register online](#) for this complimentary webcast, or download the [paper registration form](#). The live presentation will take place in downtown Toronto at CI Investments. A nominal charge for lunch will apply to attend the live event. Non-members are invited to attend at full-price. We look forward to your participation.

## Membership Renewal

STEP Canada's annual membership renewal campaign was initiated this month. Notification letters have been sent to all members via Canada Post. These letters are friendly reminders that membership fees are due as of April 1, 2017. You can pay your annual membership fee online by signing into your [STEP Canada account](#); over the phone by contacting our member services department (1-877-991-4949 x221); or by mailing a cheque to our national office. STEP continues to deliver opportunities of unparalleled education, representation and networking to members. We look forward to another successful year ahead and thank you for your continued support.



## Call for Nominations to the STEP Canada Board of Directors

Elections for STEP Canada's Board of Directors will be held at the Annual General Meeting (AGM) on Sunday, June 11, 2017. The terms of twelve directors will expire in June 2017, and an additional director position has been added, for a total of 13 openings. A notice was sent out to all full members in early March regarding the nomination and election process. For more information, please [click here](#) to view the notice.

## Now Accepting Entries for the 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 submit an entry, please visit [www.stepcca.org](http://www.stepcca.org).

## Family Enterprise Advisor (FEA) Program - Special Offer for STEP Members

**TEP Testimonial:**

“Before I took the program I mainly dealt with just the business owner, I didn’t really probe into areas beyond my technical tax expertise. Now I have meaningful conversations with family members and I am able to identify non tax related issues that need to be considered.”

- Kathy M. Munro, FCPA, FCA, FEA, TEP; PwC Partner, Tax



The FEA Program prepares advisors to handle the complexities inherent to business families. Take your advising expertise to a whole new level and become a trusted source of insight for your family enterprise clients. STEP members receive a 10% discount on the 2017 FEA Program, which starts this May in Calgary.

For more information regarding the IFEA and the FEA Program, please visit [ifea.ca/feap](http://ifea.ca/feap).

**Canada's Anti-Spam Legislation**

We are in the process of updating our mailing list to comply with [Canada's Anti-Spam Legislation](#) requirements. In November and December of 2016, we sent an email to members who we did not have adequate consent from, confirming their electronic mail preferences. Members who did not respond to this email will be called over the next few weeks in an effort to successfully capture this data.

As a member of STEP Canada, you are entitled to a number of exclusive industry resources that we share via email. This includes our monthly newsletter, the STEP Insider, which highlights career opportunities, educational updates, and upcoming STEP events; our triannual newsletter, the STEP Inside magazine, which features a number of insightful articles written by practitioners; and our eNews bulletins, which announce important industry news such as government submissions. [Click here](#) for a full list of STEP publications and membership benefits.

Your compliance efforts are most appreciated and we thank you for your support in obtaining this important information.

**Next Upcoming Branch/Chapter Events****Montreal Branch**

March 16, 2017  
[The 2017 Insurance Landscape: What You Need to Know](#)

**Calgary Branch**

March 21, 2017  
[Preparing for Retirement: Financial & Insurance Aspects](#)

**Winnipeg Branch**

March 21, 2017  
[The Role of the Public Guardian and Trustee](#)

**Edmonton Branch**

March 23, 2017  
[Farm Legacies and Estate Planning – CASE STUDY](#)

**Atlantic Branch**

April 6, 2017  
[Drafters in a Dangerous Time: Dealing with Modern Issues](#)

**Vancouver Branch**

April 6, 2017  
[Powers of Attorney and Health Care Agreements from Three Unique Perspectives](#)

**Toronto Branch****London Chapter**

April 12, 2017  
[Estate Planning for Global Families](#)

**Okanagan Chapter**

May 11, 2017  
[Family Trusts and Estates –  
When the CRA Comes Knocking  
and Other Topical Issues](#)

**Saskatchewan Chapter**

May 17, 2017  
[US Tax and Estate Update](#)

May 3, 2017  
[Estate Planning for Blended Families](#)

**Ottawa Branch**

May 17, 2017  
[Economic Update and Budgeting](#)

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