E-Newsletter Vol. 6
Issue 03 - March 13, 2018

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.

Bilingual Financial Advisory Consultant – RBC Wealth Management, Toronto, ON

Estate and Trust Advisor – MD Financial Management, Canada

Estate and Trust Consultant – Scotiabank, Ottawa, ON

Tax and Estate Planning Practitioner (Lawyer or Accountant) – Assante Private Client, Winnipeg, MB

Wealth Planning Consultant (Estate Planning Lawyer) – Assante Private Client, Winnipeg, MB or Toronto, ON

STEP Canada's Practitioner Opportunities service is a great resource for practitioners in the trust

Education Center

French Education Initiatives
The first courses of the Diploma Program and CETA are now open for registration. We are excited to be offering these courses with a civil law focus, and welcome new registrations and referrals as the translation continues. The first French Diploma exam, Droit des fiducies (Law of Trusts) will be held on May 14, 2018. The first French CETA exam, Cours de base en administration de successions et de fiducies (Foundations of Estate and Trust Administration), will take place on September 17, 2018. Please visit www.step.ca/french for more information, or contact education@step.ca.

Certificate in Estate and Trust Administration (CETA)

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

The next set of CETA exams (in English) are scheduled for September 17, 2018 and March 4, 2019. CETA1 marks will be distributed this week and CETA2-4 marks will be shared within the next 6-8 weeks. Should you have any issues, email education@step.ca.

Assessment by Exam
The next Diploma Program exam dates (in English) are scheduled for May 14 and November 5, 2018. For those writing an exam in May, electronic exam instructions will be shared via email in the coming weeks.

Students are now able to register and pay for diploma courses using our online registration system.

Assessment by Essay
The next essay intake dates are May 1 and October 1, 2018. Click here for the pre-approved list of essay topics.

Contact Education

STEP Canada's Top Students 2018

A big congratulations to the top scoring students of 2017! The following students will be featured in the May 2018 edition of STEP Inside, and presented with an award of academic excellence at the upcoming 20th National Conference during the annual student reception.

Highest Mark in Law of Trusts, Diploma Program:
Kristina Hyland, CIBC, STEP Toronto Branch

Highest Mark in Taxation of Trusts and Estates, Diploma Program:
Danielle Carter, Collins Barrow Peterborough LLP, STEP Toronto Branch

Highest Mark in Wills, Trust and Estate Administration, Diploma Program:
Martina Zanetti, Norton Rose Fulbright Canada LLP, STEP Vancouver Branch

Highest Mark in Trust and Estate Planning, Diploma Program:
Tony Lee, Cinnamon Jang Willoughby & Company, STEP Vancouver Branch

Highest Overall Average, Diploma Program (Gerald W. Owen Book Prize):
Tony Lee, Cinnamon Jang Willoughby & Company, STEP Vancouver Branch

Highest Mark, Assessment by Essay:
Carla Figliomeni, Miller Thomson LLP, STEP Toronto Branch

Highest Overall Average, Certificate in Estate and Trust Administration:
Betty Laidlaw, Fasken Martineau, STEP Toronto Branch

Mark your calendars! The 2018 annual student reception will take place at 5:00 pm on Monday, May 28 at the Metro Toronto Convention Centre. All students are welcome! For students not attending the national conference, an invitation will be sent via email at the end of April. This is always a great event, and a wonderul networking opporunity for the student body to partake in. We hope to see you there!

20th National Conference 2018
Register before March 31st!

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. Early bird registration is now open, offering both members and non-members $100 savings if registered before March 31st. Discounted student pricing is available to active students. Visit the national conference website for more information.

2018 Federal Budget Live Webcast

Please join us on Friday, March 23 for STEP Canada's 2018 Federal Budget Live Webcast. Our distinguished panel of experts will share their thoughtful insights and reflections as they discuss the 2018 Federal Budget, emphasizing the most important highlights in relation to trust and estate practice. Panelists will provide practitioners with valuable and practical recommendations they can take back to their clients. For more details and registration, please click the button below.

Details & Registration

Membership Renewal

STEP Canada has begun its annual membership renewal campaign. Notification letters were sent to all members and students via Canada Post last week. These letters are friendly reminders that membership fees are due as of April 1, 2018.

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.

Now Accepting Entries for the 13th Annual STEP Private Client Awards 2018/19

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 November 7, 2018 in London, UK. This black-tie event attracts over 700 private client practitioners and offers exceptional networking opportunities. For more information about the Private Client Awards and how to submit an entry, please visit www.steppca.org.

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

Family Enterprise Xchange (FEX) is once again pleased to offer STEP members a **10% discount on 2018 offerings of the FEA Program**. This is the only professional development program leading to a designation that will distinguish you as a Family Enterprise Advisor (FEA) to business families. Whether you are an accountant, lawyer, banker, investment advisor, wealth manager or insurance professional, the FEA Program augments your formidable technical skills with strategies and tools to incorporate social and human considerations into your role as a trusted advisor. Visit family-enterprise-xchange.com/fea for details.

FAMILY ENTERPRISE XCHANGE

fea FAMILY ENTERPRISE ADVISOR

Upcoming 2018 FEA PROGRAMS | Calgary: May 28

To learn more, contact Peter Cotterill:
pcotterill@family-enterprise-xchange.com | 778.991.3365

TEP Testimonial:
"As much as the TEP designation identifies qualified trust and estate practitioners, the FEA designation is quickly becoming the standard in Canada to identify family enterprise advisory specialists. The FEA Program compels advisors to step back from their technical wheelhouse and provides critical context for advisors in their work with transgenerational family businesses."

- Cindy Radu, TEP, FEA | Partner BDO Canada LLP

Upcoming Branch & Chapter Events

For event details, click here to access branch/chapter microsites.

Montreal Branch

Thursday, March 15
Recent Tax Department Interpretations, Court Decisions, and Legislative Developments

Okanagan Branch

Thursday, May 17
Wills Variation Actions & Annual Chapter Meeting

Calgary Branch

Tuesday, March 20
Financial Planning - Including RCAs, IPPs

Winnipeg Branch

Tuesday, March 20
Estate Planning Issues (Traps and Tips – Capacity, Undue Influence and Joint Assets)

Edmonton Branch

Thursday, March 22
Pension Myths and Legends

Atlantic Branch

Thursday, March 29
How the Philanthropic Universe is Changing

Toronto Branch

Wednesday, April 11
Tax Update and Related Issues

Vancouver Branch

Thursday, May 10
Estates in a Digital Age & Annual Branch Meeting

London & SWO Chapter

Wednesday, May 16
Tax Update Presentation – Consider Current Issues for Professional Corporations, Small Business Deduction Changes, Finance's Proposed Paper on Income Splitting & Annual Chapter Meeting

Ottawa Branch

Wednesday, May 16
Budget Update & Annual Branch Meeting

Saskatchewan Chapter

Wednesday, May 23
Life Insurance Policy Transfers, Implications of the 2016 Federal Budget & Annual Chapter Meeting

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