



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

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

[Estate and Trust Advisor - MD Financial Management, Various Locations Across Canada](#)

[Estate and Trust Advisor - MD Financial Management, Moncton, NB](#)

[Estate and Trust Specialist - Concentra Bank, Vancouver, BC](#)

[High Net Worth Planner - TD Wealth, Vancouver, BC](#)

STEP Canada's Practitioner Opportunities

Education Center

Exam Sittings & Essay Intake Dates

Education Program	Exam/Essay Dates
CETA	September 16, 2019
Assessment by Exam (Diploma Program)	May 27, 2019 November 4, 2019
Assessment by Essay	May 1, 2019 October 1, 2019

French Education Program

The French Civil Law diploma program is open for registration. The first exam sitting for CETA 1 - Civil Law is September 16, 2019. For more information regarding our French programs and registration, please visit <http://www.step.ca/french>

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. The STEP Canada [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 2,600 potential candidates. To learn more about this service, please [click here](#).

Visit our online job board today!



www.step.ca/opportunity

Learn More

or email Education - French Initiatives.

Certificate in Estate and Trust Administration (CETA)

Students that completed CETA exams on March 4, 2019 can expect to receive their grades by April 15, 2019. The next exam date for CETA courses is scheduled for September 16, 2019.

Assessment by Exam (Diploma Program)

The next exam date is May 27, 2019. Exam location and instructions will be sent to students in April 2019. The registration deadline in May 1, 2019.

Assessment by Essay

Revised essay topics for 2019 are now available on the [STEP Canada](#) website. The submission dates are May 1 and October 1, 2019. Essays are to be submitted with appropriate documentation to education@step.ca

Mentorship Program & Study Groups

STEP Canada's Volunteer Mentorship Program is grounded in STEP's ongoing mandate to advance practitioner knowledge. If you can dedicate two hours per month to help groom and foster relationships with the next generation of TEP members, please complete this [mentor survey](#) to apply. For more information and application details, please contact education@step.ca.

Students interested in forming a study group, please add your contact information to the online [Study Partners Google Document](#). While STEP Canada does not formally arrange study groups or pairings, we hope this document will assist students in organizing their own meetings.

Contact Education



21ST NATIONAL CONFERENCE



JUNE 6-7, 2019

METRO TORONTO CONVENTION CENTRE

Register before March 31st to save \$100!

Join **STEP Canada** at the Metro Toronto Convention Centre on June 6-7. As a delegate, you will benefit from up to **13.50 secured substantive CPD hours** across two full days of strategically planned technical sessions in addition to valued networking opportunities with over 780 fellow practitioners from across the globe. Plenary and concurrent sessions provide practitioners from all disciplines with information that will greatly enhance their practices. We are pleased to announce in addition to the secured substantive CDP hours, we have also secured specialized accreditation from specific professional bodies, including:

- **Law Societies of:**
 - **British Columbia, New Brunswick, Ontario, Saskatchewan**
- **Financial Planning Standards Council**
- **Institute for Advanced Financial Education**
- **Insurance Council of Manitoba**

For more information on CPD accreditation and more, or to register please visit our [national conference website](#).

WHEN: June 6 - 7, 2019

WHERE: [Metro Toronto Convention Centre](#) | Level 700 - South Building | 222 Bremner Blvd. Toronto, ON

ACCOMODATION: [InterContinental Toronto Centre](#) | 225 Front Street West, Toronto, ON | for reservations: ["STEP Canada 2019"](#) | Nightly Group Rate: \$279.00 (plus applicable taxes) per single or double occupancy based on availability

QUESTIONS? STEP Canada | 416.491.4949 x221 | memberservices@step.ca

[Register Now](#)

STEP Canada's Top Performing Students 2019

Each year we highlight the achievements of our top performing students at both our national conference and within the May issue of STEP Inside. We will be presenting all students below with an award of academic excellence at the annual student reception during our 21st National Conference. Please join us in congratulating all of our students for their hard work and wish them much future success!

Highest Mark - Law of Trusts

Jennifer Corak, Miller Thomson LLP, Toronto Branch

Highest Mark - Taxation of Trusts and Estates
R. Paul Thorne, Sun Life Financial, Atlantic Branch

Highest Mark - Wills, Trust and Estate Administration
Darryl Antel, Felesky Flynn LLP, Edmonton Branch

Highest Mark - Trust and Estate Planning
Sarah Netley, Baker Tilly, Toronto Branch

Highest Overall Average - Diploma Program (Gerald W. Owen Book Prize)
Dwight D. Dee, Miller Thomson LLP, Vancouver Branch

Highest Mark - Assessment by Essay
Ariane Paré-Brass, MD Private Trust Company, Montreal Branch

Highest Overall Average - Certificate in Estate and Trust Administration (CETA)
Braeden James Rahn, Geoffrey W. White Law Corporation, Okanagan Chapter

Mark your calendars! The 2019 annual student reception is scheduled to take place at 5:00 pm on Thursday, June 6 at the Metro Toronto Convention Centre. All students are welcome! For students not attending the conference, an invitation will be sent via email mid-March. The celebration will be hosted by STEP Canada and STEP Worldwide senior executives, and is a fabulous networking opportunity for all students to participate in. We look forward to seeing you there!

STEP Founder's Award for Outstanding Achievement

Two of our incredible members were recently honoured with a STEP Founder's Award. This prestigious award is granted to those who have made both an exceptional and outstanding long-term contribution to the Society above and beyond that normally expected of a member through his office in his or her branch or elsewhere in the voluntary life of the Society. Join us in congratulating Christine and Peter for their continued years of service, it's members like you that help make STEP and STEP Canada a success!



Christine Van Cauwenberghe
IG Wealth Management
Winnipeg Branch
[60-second interview](#)



Peter Weissman
Cadesky Tax
Toronto Branch

2019 STEP Canada Full-Day Course
Succession of the Family Business
Final Course:
[March 26 - Halifax](#)



Presented by: Cindy Radu, FCPA, FCA, LLB, LLM, ICD.D, FEA, TEP, Unbiased Financial Services Inc.; Calgary; Deputy Chair, STEP Worldwide Business Families Special Interest Committee; Winner, 2018/19 People's Choice – Trusted Advisor of the Year Award (13th Annual STEP Private Client Awards); Member, STEP Calgary

Course Description: This full-day course (8:30 am - 4:30 pm) is designed for Advisors who work with family businesses and family wealth transition. It provides an integrated frame of reference and presents a new approach to family business transition planning. As such, the course will be of interest regardless of area of specialization. A range of "hard" and "soft" topics will be covered from both advisor and family perspectives. Several case studies will be incorporated to illustrate concepts in context. This will be a full-day with opportunities for participants to dialogue and share experiences.

[Register Now](#)

2019/20 Membership Renewal

STEP Canada has begun its annual membership renewal campaign as of March 1, 2019. Notification letters have been distributed to all members and students via Canada Post and serve as friendly reminders that membership fees are due as of April 1, 2019. We would like to thank all of our members for their continued support. STEP continues to deliver an unparalleled level of education, representation and networking opportunities and looks forward to another successful year together!

Upcoming Industry Events

STEP Canada will be participating at the events below this spring. We're excited to connect with industry professionals to discuss our routes to membership and the many benefits of a TEP designation. We look forward to seeing you there!

- March 14 - 16 | Quebec City | [Chambre des notaires | Cours de Perfectionnement du notariat](#)
- April 12 | Montreal | CAGP | [CAGP's 26th National Conference on Strategic Philanthropy](#)

Sponsored Breakfast Session:

STEP Canada: Recent Trust and Estate Case Law Decisions

Gift planners, fundraisers, professional advisors and senior industry leaders will benefit from attending this special session by two esteemed STEP members as they provide insight on recent and important case law, including decisions on Henson trusts, multiple wills, beneficiary designations, and discretionary decisions by trustees. Decisions from both common- and civil-law jurisdictions of interest to the gift and estate planning industries will be examined through the lens of designated Trust and Estate Practitioners (TEPs). An opportunity to learn about the most important and juicy cases while enjoying your breakfast juice!

Janet Michelin, BCL, LLB, TEP, Montreal: IMK SENCRL/LLP

Richard Niedermayer, LLB, TEP, Halifax: Stewart McKelvey; Director at Large, STEP Canada



Upcoming Branch & Chapter Events

STEP Canada branches and chapters have an exciting 2018-19 program planned for this fall. The STEP Value Passport is also available for applicable branches and chapters. For more details, [click here](#) to access branch/chapter microsites.

Montreal Branch

Thursday, March 14
[Wills and Trusts: Analysis of Provisions and Comments](#)

Calgary Branch

Tuesday, March 19
[Interdisciplinary Panel Discussions: Family Farm Succession Case Studies](#)

Winnipeg Branch

Tuesday, March 19
[Kid's Stuff: Property Issues Related to Minors](#)

Ottawa Branch

Wednesday, March 20
[Privilege, Penalties, and Professional Liability: Practical Tips for Trust and Estate Practitioners to Protect Client Interests and Reduce Risks](#)

Edmonton Branch

Thursday, March 28
[Beyond Nuts and Bolts – Where Insurance Fits as Part of the Estate Planning Process](#)

Atlantic Branch

Thursday, April 4
[#isanyonereallywinning \(other than the lawyers\)?: Trends in Estate Litigation](#)

Toronto Branch

Wednesday, April 10
[Non-Tax Issues in Succession Planning](#)

Vancouver Branch

Thursday, May 9
[So Your Clients Are Separating... Implications to Their Wealth Planning & Annual Branch Meeting](#)

Okanagan Chapter

Tuesday, May 14
[Protecting Clients from Their Children's Family Law Claims & Annual Chapter Meeting](#)

Saskatchewan Chapter

Wednesday, May 15
[2019 Tax Update](#)

Southwestern Ontario Chapter

Wednesday, May 15
[Elder Law & Planning for the Aging & Annual Chapter Meeting](#)

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