

STEP Canada Insider

E-Newsletter Vol. 4
Issue 5 - May 10, 2016



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

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

Current Opportunities

[Bilingual Estate Trust Analyst – MD Financial, Ottawa](#)

[Central Operations Estates Representative – Valley First \(a division of First West Credit Union\), Penticton, BC](#)

[Executive Trust Officer – TD, Calgary](#)

[Trust Associate – Legacy Private Trust, Toronto](#)

[Learn More](#)

Annual Student Reception & Awards

Education Center

Certificate in Estate and Trust Administration (CETA)

The third course of the CETA program, CETA3 was recently launched. Students who have successfully completed CETA2 can now register for CETA3 and prepare to write the exam on September 19, 2016.

The next exam date for CETA1 and CETA2 students is scheduled for May 30 (online exam). Students writing CETA exams on May 30 are encouraged to review the [CETA Program Rules and Regulations](#) and ensure that their technology requirements are adequate for exam day.

Diploma Program

The next exam date is scheduled for May 30, 2016 (paper-based exam). Students writing Diploma Program exams on May 30 are encouraged to review the [Diploma Program](#)

Presentation

The Education and Student Liaison Committee Chairs are inviting all students of STEP Canada to attend the annual student reception & awards presentation. The reception will take place in the afternoon of Thursday, June 9 (5:00 pm – 6:00 pm), day one of the two-day national conference in Toronto. The reception will offer students the opportunity to network with STEP Canada and STEP Worldwide senior executives, as well as past award recipients. Registration to the national conference is not required.

All students should have received an official invitation to the event via email yesterday. If you have not received your invitation, please contact education@step.ca.

[Rules and Regulations.](#)

Qualified Practitioner Program

The next essay intake deadline is October 1, 2016. Please view the list of [current approved essay topics](#). If you are submitting an essay, please ensure you have reviewed essay guidelines and have prepared the required forms and fees to submit along with your essay.

Please contact education@step.ca for more information on STEP's education programs.

Good luck to all exam writers!

**Contact
Education**

18th National Conference - June 9-10, 2016

The National 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 our 17th National Conference.



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

Continuing Education Credits

Stay informed on CPD accreditation for this year's National Conference. We've already received CE approval from a number of organizations. [Click here](#) for more information.

Our Sponsors

STEP Canada has secured historical support from many industry sponsors for the conference; please follow this link to explore the [organizations](#) that are helping to make the 18th National Conference so special.

eNews – May 9, 2016 - STEP Canada donates \$1,000

Member feedback to the May 9th eNews announcing the STEP Canada donation to the Canadian Red Cross in support of those affected by the Fort McMurray fires (although generally outside STEP Canada's mandate) has been positive. While not a large amount of money, we hope that the STEP Canada donation has inspired many of our members to consider supporting our fellow Canadians affected by the devastation. Your individual donations can truly make a difference. Thank you to all our STEP members who have offered and will offer support, in financial and other worthwhile ways.

STEP's CPD Policy

STEP Worldwide has produced an informative [video](#) for members, outlining the guidelines of the

new CPD policy. We encourage members to set aside a few minutes to review the video linked below. For further questions, please contact cpd@step.org.

All resources mentioned in the video can be found on the STEP Worldwide website in the [CPD centre](#). You will need your STEP Worldwide username and password to access the materials. For login assistance, please contact memberservices@step.ca.



Annual Branch & Chapter Meetings

Over the next few weeks STEP Canada's regional branches and chapters will be holding annual meetings. For applicable regions, elections for new regional executives and officers will take place; and the winner of the branch or chapter "volunteer of the year award" will be announced.

2016 Upcoming Branch/Chapter Events

Winnipeg

May 10

[Cross-Border Issues](#)

Saskatchewan

May 11

[U.S. Tax Planning for the Citizen and Non-Citizen](#) + *Annual Chapter Meeting*

Edmonton

May 12

[The Rapidly Evolving Effect of Electronic Signatures](#) + *Annual Branch Meeting*

London

May 18

[Real Life Issues for Improvements in Wording for Medical Decision Making, Determining Capacity for Execution of Documents, and Issues in Physician Assisted Dying. Update on Life Insurance Changes for 2017.](#) + *Annual Chapter Meeting*

Ottawa

May 18

[Federal Budget 2016](#) + *Annual Branch Meeting*

Toronto

May 18

[Planning Using Trusts](#) + *Annual Branch Meeting*

Atlantic

May 19

[Use of Insurance in Estate Planning](#)

Montreal

May 19

[Life Insurance Topics](#) + *Annual Branch Meeting*

Calgary

May 25

[Advising with Respect to Advance
Care of the Elderly](#) + *Annual
Branch Meeting*

Vancouver

May 26

[Current Topics in Canadian Tax
Planning for Owner-Managed
Businesses](#) + *Annual Branch
Meeting*

Okanagan

June 1

[Practice Points for an Ageing
Population](#) + *Annual Chapter
Meeting*

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