

STEP Canada Insider

E-Newsletter Vol. 5
Issue 05 - May 9, 2017



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

- [Family Office Director – First Affiliated Holdings Inc., GTA or Collingwood, ON](#)
- [Regional Director – Scotiabank, Calgary, AB or Vancouver, BC](#)
- [Regional Vice-President, Wealth Planning – Assante Wealth Management, Toronto, ON](#)
- [Senior Trust & Estate Consultant, Private](#)

Education Center

Certificate in Estate and Trust Administration (CETA)

Registration is now open for the next set of CETA exams, scheduled for **September 18, 2017**. Please [click here](#) to enrol in this innovative educational program.

Diploma Program

The next exam date is scheduled for **May 29, 2017**. To help prepare students who are writing this month, the tutorials are now posted in the [Student Resources](#) section. Exam location and additional details have been sent to students. If you have not received this email, please email education@step.ca. Good luck to all exam writers!

Qualified Practitioner Program

Student essays submitted on May 1, 2017 are currently being graded. Marks will be distributed in the next 6-8 weeks.

The next essay intake deadline is **Oct 1, 2017**. Essay topics must be selected from the pre-

[Wealth Management – CIBC Trust Corporation, Ottawa, ON](#)

- [Trust Company Legal Counsel – Caledon Trust, Toronto, ON](#)



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

[Learn More](#)

[Contact Education](#)

approved list of topics on the [website](#).

Annual Student Reception & Awards 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 Monday, June 12 (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 will receive an official invitation to the event this week.

Register for STEP Canada's 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**. Visit the [event website](#) for more information.

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 19th National Conference so special.

STEP Canada Annual General Meeting - Director at Large Election

A notice was sent out last Friday via email to all STEP Canada full members, informing of the upcoming Annual General Meeting, held in Toronto on June 11, 2017. The notice included information and election statements from all nominees running for the two open Director at Large positions on the STEP Canada Board of Directors. The notice also included a form of proxy for all voting members in good standing. Forms must be submitted before Thursday, June 8. Please remember to cast your vote. If you are a STEP full member in good standing and did not receive this notice, please reach out to our [member services team](#).

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 purchase tickets, please visit www.steppca.org.

Annual Branch & Chapter Meetings

Over the next few weeks STEP Canada's regional branches and chapters will be holding annual branch and chapter 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.

Next Upcoming Branch/Chapter Events

Edmonton Branch

May 11, 2017
[Border Barriers to the Mobile Client, Wind-Up Wine & Cheese Reception](#) + *Annual Branch Meeting*

Montreal Branch

May 11, 2017
[Review of Recent Case Law on Trusts, Estates and Wills \(Civil Law\) and Review of Civil and Tax Law on the Use of a "Substitution" as a Deemed Trust to Avoid the Independent Trustee Rule](#) + *Annual Branch Meeting*

Okanagan Chapter

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

Winnipeg Branch

May 16, 2017
[Developments in Canadian Pensions](#)

Ottawa Branch

May 17, 2017
[Economic Update and Budget](#) + *Annual Branch Meeting*

Saskatchewan Chapter

May 17, 2017
[US Tax and Estate Update](#) + *Annual Branch Meeting*

Toronto Branch

May 17, 2017
[Challenges of Probate Planning](#) + *Annual Branch Meeting*

Calgary Branch

May 24, 2017
[Politically Correct Tax Planning, Wine & Cheese Reception](#) + *Annual Branch Meeting*

Atlantic Branch

May 25, 2017
[3rd Annual Sparkling Reception](#) + *Annual Branch Meeting*

Vancouver Branch

May 25, 2017
[Estate Planning from a Family Law Perspective](#) + *Annual Branch Meeting*

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