



## 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.

Estate Litigation Lawyer – WEL Partners,  
Toronto, ON

Division Director, Accelerated Program –  
Investors Group Financial Services Inc., Calgary,  
AB

Tax Specialist (Permanent / Full-time) – MD  
Financial, Ottawa, ON

Trust Administrator – Solus Trust Company  
Limited, Vancouver, BC

STEP Canada's Practitioner Opportunities

## Education Center

### Upcoming Exam Sittings & Essay Intake Dates

| Education Program                       | Exam/Essay Dates                    |
|---|-------------------------------------|
| CETA                                    | September 17, 2018<br>March 4, 2019 |
| Assessment by Exam<br>(Diploma Program) | May 14, 2018<br>November 5, 2018    |
| Assessment by Essay                     | October 1, 2018<br>May 1, 2019      |

### French Education Initiatives

The French language CETA and Diploma programs are open for registration. For more information regarding our French programs, please visit [www.step.ca/french](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. 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](#)

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

To register for an upcoming CETA exam, [click here](#).

### Assessment by Exam

We are now accepting registrations for the November 5 exam. To register for the English (common law) exam, [click here](#). To register for the French (civil law) exam, [click here](#).

We are excited to offer our first electronic exam on May 14! In preparation, students were asked to download the Exemplify software last month. Please ensure you have successfully downloaded the software and have submitted your signed consent form to [education@step.ca](mailto:education@step.ca). Instructions and location details have been shared via email. Good luck on your exam!

### Assessment by Essay

[Click here](#) for the October 1 pre-approved list of essay topics. Students who submitted an essay on the May 1 intake date can expect to receive their grade within the next 6-8 weeks. Please email [education@step.ca](mailto:education@step.ca) if you have questions regarding your essay submission.

[Contact Education](#)

## 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, May 28 (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 via email this week. **RSVP is required for this event.**

## 20th National Conference 2018

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 2018 conference is happening next month in downtown Toronto. Join us alongside 750+ fellow practitioners for 2 days of quality technical sessions and insightful keynotes. Click the image below for more information. We hope to see you in May!



"This conference is always an impressive congregation of the brightest tax minds with an unbelievable sharing of knowledge and ideas."

**STEP CANADA 20TH NATIONAL CONFERENCE**

**MAY 28-29, 2018** | METRO TORONTO CONVENTION CENTRE  
HOST HOTEL: DELTA TORONTO

**REGISTRATION AND DETAILS**

Hear from 2017 attendees **▶ PLAY VIDEO**

**STEP**  
Canada  
ADVISING FAMILIES ACROSS GENERATIONS

---

## STEP Canada Press & Brand Awareness

Keep an eye out for STEP Canada in the Globe and Mail, Report on Business. You'll catch some exciting announcements, including an advertisement highlighting STEP Canada's 20th anniversary and national conference, which recognizes the sponsors who have generously contributed to the occasion. The spread also contains an interview with our national chair, Ruth March. Don't forget to grab your copy on May 29th!



The 2018-19 Board of Directors appointment notice will also hit news stands this spring. Be sure to scan the business section on June 6th.

STEP Canada is proud to showcase its brand in reputable publications such as the Globe and Mail. Creating a greater public understanding of STEP and the Trust and Estate Practitioner (TEP) designation is an important and continuous effort. Please share these exciting announcements with your friends, colleagues and fellow practitioners.

---

## Membership Renewal

Annual membership fees were due as of April 1st, 2018. **To avoid suspension, please submit payment as soon as possible.** Members can pay online by visiting [www.step.ca](http://www.step.ca) and logging into their personal account. Payment may also be submitted over the phone by contacting member services at 1-877-991-4949 x221.

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.

---

## STEP Referral Rewards

Help expand the STEP network! According to the 2017 STEP Members' Satisfaction Survey, 97% of STEP members would recommend STEP to a colleague. When you recommend a colleague, you will be entered into a prize draw to win an iPad. All you need to do is [login](#) to your STEP Worldwide account and complete the member referral form. STEP will provide your colleague with all the information needed to join.

Visit <https://www.step.org/recommend-colleague> for more information.

<hr size=3 width="100%" align=center>

## 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](http://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](http://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](mailto: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.

### Atlantic Branch

Thursday, May 10  
Planning Through the Ages & Annual Branch Meeting

### Winnipeg Branch

Tuesday, May 15  
Medically Assisted Dying and Health Care Directives

### Ottawa Branch

Wednesday, May 16  
Budget Update & Annual Branch Meeting

### Okanagan Chapter

Thursday, May 17  
Wills Variation Actions & Annual Chapter Meeting

### Montreal Branch

Thursday, May 24  
Prolonged Administration of an Estate: Could This Replace Testamentary Trusts? + Annual Branch Meeting

### Edmonton Branch

Thursday, May 24  
Collision of Care at the Intersection of Medicine and Capacity & Annual Branch Meeting

### Vancouver Branch

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

### Toronto Branch

Tuesday, May 15  
Family Office – Family Planning & Annual Branch Meeting

### London Chapter

Wednesday, May 16  
2018 Canadian Tax Update – Tax on Split Income (TOSI) and Taxation of Passive Income in Corporations & Annual Chapter Meeting

### Saskatchewan Chapter

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

### Calgary Branch

Thursday, May 24  
Impact of Technology, Intellectual Property and Genetic Information & Annual Branch Meeting

[Return to Top](#)