

# STEP Canada Insider

E-Newsletter Vol. 3  
Issue 11 - November 10, 2015



## Welcome to the STEP Canada Insider!

With access to the monthly STEP Insider, readers will receive the latest news about branch/chapter activity, national conference updates, practitioner opportunities, education, and more!

## Next Scheduled Branch/Chapter Events

[Click here to see YOUR next regional branch event](#)



## Practitioner Opportunities

STEP Canada's Practitioner Opportunities service offers an electronic recruitment resource for the trust and estate industry. We are offering this recruitment tool to all STEP members at a discounted rate! Please visit our [Practitioner Opportunities](#) page for more information.

### Current Opportunities

[Estate & Succession Planning Consultant – The Millar Corporation, Ottawa](#)

[Estate and Trust Advisor – MD Financial Management, Saskatoon](#)

[Executive Trust Officer – TD Bank Group, Markham](#)

[Manager, Taxation - Wealth Management – Scotiabank, Vancouver](#)

[Public Trustee Representative – Alberta Human](#)

## Education Center

### Qualified Practitioner Route

We are in the process of revising the essay topics. The new list will be available very shortly. In the meantime, if you are getting a head start on the May 1, 2016 submission date and want to make sure your topic is still relevant, please contact [education@step.ca](mailto:education@step.ca).

### Exam Information

Good luck to all students who are scheduled to write the following exams on Monday, November 23, 2015:

- Law of Trusts (paper)
- Taxation of Trusts & Estates (paper)
- Wills, Trust & Estate Administration (paper)
- CETA1: Foundations of Estate and Trust Administration (online)

In preparation for these exam sittings, tutorials were recently held. If you were unable to

[Services, Edmonton](#)

[Regional Vice President, Wealth Planning \(Tax Accountant\) – CI Financial, Dorval QC](#)

[Scotiabank Branch Manager – Scotiabank, Edmonton](#)

[Senior Advisor and Trust Officer, Private Wealth 1859 – National Bank, Winnipeg](#)

[Senior Will & Estate Planner – Scotiabank, Toronto](#)

[Tax and Accounting Associate, Internal Auditor – Legacy Private Trust, Toronto](#)

[Trust Officer – Scotiabank, Victoria](#)

[Trust Officer – TD Bank Group, Ottawa](#)

[Wealth Management - Manager, Taxation – Scotiabank, Montreal](#)

participate in your course's tutorial session in-person, you can review the audio recording and presentation slides on our website in the student resources area 48 hours after the scheduled tutorial time.

Exam location and timing details have been sent to all students registered to take their exam on November 23. Please contact [education@step.ca](mailto:education@step.ca) if you have not received this information.

As a reminder, all students must show government-issued, photo ID to the proctor prior to taking each exam.

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

The CETA2 exam is taking place on Monday, January 25, 2016. Tutorial details will be sent out the week of November 30th. The final chapters and self-assessment quizzes will be available shortly.

[Learn More](#)

[Contact Education](#)

## **2016 National Conference – Send us your ideas!**

STEP Canada's 18<sup>th</sup> National Conference will take place **Thursday and Friday, June 9 and 10, 2016** at the [Metro Toronto Convention Centre](#). The 2016 National Conference Program Committee **invites members to contribute to the conference content** by submitting session topic ideas; presentation proposals; and questions for the STEP Canada / CRA Round Table. In order to be considered, please send your ideas and proposed questions to [jamstrong@step.ca](mailto:jamstrong@step.ca) by Friday, January 15.

## **Regional Branch Programs 2015-16**

STEP continues to deliver critical and relevant information essential to the trust and estate practice. Take advantage of our educational programs by purchasing the STEP Value Passport, a member only all-access pass to branch events in your area (available for select STEP branches). Purchase your passport, or register for an event by visiting the [Programs & Seminars](#) section of the STEP Canada website and clicking on your applicable branch location.

## **Certificate in Estate and Trust Administration**

STEP's self-study online CETA program is of value to individuals who want to start or advance their career, and to employers who want to seize the many business opportunities resulting from today's changing demographics. Organizations staffed by knowledgeable estate administrators and trust officers who can skillfully manage this changing market will attract new clients and business prospects. [Click here](#) to learn more about this educational offering.

### **STEP Canada's National Office is Moving**

The STEP Canada National Office is currently located in downtown Toronto. The office is moving uptown to Yonge and Sheppard in early January.

**As of January 15, 2016 STEP Canada National Office address:**

45 Sheppard Avenue East, Suite 510

Toronto, ON M2N 5W9

[Click here](#) for directions



## 2015/16 Upcoming Branch/Chapter Events

### Montreal

November 12, 2015

[New Trust Rules & Graduated Rates](#)

### Ottawa

November 12, 2015

[Tax Treatment of Registered Assets on Death](#)

### Toronto

November 18, 2015

[Charitable Update: the Good, the Bad and the Inexplicable](#)

### Atlantic

November 19, 2015

[Does Estate Planning End With Incapacity?](#)

### Vancouver

November 19, 2015

[So You've Been Named as Executor/Trustee/Attorney – Now What? Risks and strategies for acting in this role](#)

### Winnipeg

November 24, 2015

[What you Never Learned at University: Farm Tax and Succession Planning](#)

### Calgary

November 26, 2015

[Attacking and Defending Inter Vivos and Testamentary Gifts](#)

### Edmonton

November 26, 2015

[Implications to Estate Drafters from the Perspective of Estate Litigators](#)

### Saskatchewan

January 20, 2016

[Testamentary Trust Tax Changes](#)

[Return to Top](#)

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