STEP Canada Insider

E-Newsletter Vol. 4
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Welcome to the STEP Canada Edition

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

Education Center

STEP Canada has a NEW Education Coordinator
Please welcome Janet Gerongco to the team as the new Education Coordinator at STEP Canada's National Office. Janet can be reached via email at education@step.ca or by phone at 1-877-991-4949 x229.

Local Student Liaison Officers
Get in touch with your Student Liaison Officer to learn about local events and opportunities that add value to your professional development and your student journey with STEP Canada! Click

- [Estate and Trust Advisor - MD Financial Management]
- [Estate & Trust Consultant - Scotia Wealth Management, Winnipeg, MB]
- [Senior Manager, Trust and Estate Compliance - BMO Private Banking, Toronto, ON]
- [Wealth Planning Consultant - BMO Nesbitt Burns, Calgary, AB]

Visit our online job board any day of the week for the most up-to-date job postings.

Learn More

here for contact information.

Certificate in Estate and Trust Administration (CETA)
CETA students, please visit the CETA webpage and click on **How to Enrol** to register for the **March 6, 2017** CETA exams. The deadline to register for the March exam is **November 28, 2016**.

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.

Diploma Program
The next exam dates for the Diploma Program are scheduled for **November 28, 2016** and **May 29, 2017**. Exam locations and times have been sent out to students. All tutorial slides and recordings are now posted in the student resources section.

Qualified Practitioner Program
Essay marks for the October 1st intake will be distributed to students in the coming weeks. The next essay intake deadline is May 1, 2017. Topics are posted on the website.

Contact Education

Regional Branch Programs 2016-17

STEP continues to deliver critical and relevant information essential to the trust and estate practice. To register for an event, please visit the Programs & Seminars section of the STEP Canada website and click on your branch location for event listings.

STEP Inside Newsletter – Conference Edition

The latest issue of STEP Inside was recently mailed and/or emailed to all subscribing members. This issue, the conference edition, highlights some of the most popular sessions from the 2016 national conference and the regular "In the Headlines" section. Inserted into the mailed versions were 2016-17 education event schedules for local branches and chapters, and a special offer from IFEA for STEP members.

Family Enterprise Advisor (FEA) Program - Special Offer for STEP Members

The FEA Program prepares advisors to handle the complexities inherent to business families. Take your advising expertise to a whole new level and become a trusted source of insight for your family enterprise clients. STEP members receive a 10% discount on the 2017 FEA Program, which starts in January 2017 in Toronto and Vancouver, and in May 2017 in Calgary.

TEP Testimonial:
"Before I took the program I mainly dealt with just the business owner, I didn't really probe into areas beyond my technical tax expertise. Now I have meaningful conversations with family members and I am able to identify non tax related issues that need to be considered."

- Kathy M. Munro, FCPA, FCA, FEA, TEP; PwC Partner, Tax

For more information regarding the IFEA and the FEA Program, please visit Ifea.ca/feap.

THE TOUR CONTINUES: STEP Canada National Full-Day Course – Canada/US Tax and Estate Planning: Cross-Border Issues

*** FOR LAW, ACCOUNTING, FINANCIAL PLANNING, AND INSURANCE PRACTITIONERS ***

The curriculum of this original course, which includes examples of actual perfected work product, is applicable to any practitioner with a practice in law; accounting; financial planning; or insurance. This course will equip attendees with a thorough description and understanding of all the relevant law and planning strategies they need to serve their clients with cross-border estate planning and US taxation issues, especially to enable them to identify these issues and the appropriate treatment.

Numerous practical examples and strategies are provided. Support materials include references to relevant statutes and regulations, IRS forms and instructions, secondary-source material, illustrative diagrams, and model documents.

Remaining tour dates:

Calgary – November 8 - sold out!
Edmonton – November 10
Winnipeg – November 15
Toronto – November 29 - sold out!
Cambridge (London & SWO) – December 6
Ottawa – January 26, 2017
Saskatoon – February 9, 2017

Keep an eye on your inbox for local course registration details, or visit our Programs & Seminars page for more information.

2017 National Conference – Send us your ideas and Round Table questions!

STEP Canada's 19th National Conference will take place Monday and Tuesday, June 12 and 13, 2017 at the Metro Toronto Convention Centre. The 2017 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 jarmstrong@step.ca no later than **Friday, December 16, 2016**.

STEP's CPD Policy

Each year 5% of STEP members are randomly selected for an annual CPD audit. 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.

Upcoming Industry Events

We are promoting STEP and the TEP designation at a number of industry events across Canada this season. Some of you may have seen us last month in Toronto at the Canadian Tax Foundation's Ontario Tax Conference, or in Vancouver at the CPABC/STEP Vancouver joint conference. It's always a pleasure to meet our members face to face. Please stop by our booth and say hello if you're planning to attend any of the events listed below. We look forward to seeing you there!

- November 23: FPSC Financial Planning Week, Toronto Symposium
- November 25: FPSC Financial Planning Week, Vancouver Symposium

Watch for the STEP Canada 1/3 page ad in *The Globe and Mail* supplement on Monday, November 21 in conjunction with FPSC Financial Planning Week.

Next Upcoming Branch/Chapter Events

Okanagan

November 10, 2016
Round Table Discussion: Practical and Tax Issues of Settling a Trust & Presentation of

Ottawa

November 16, 2016
Pitfalls in Drafting Gift Agreements

Subsection 75(2) of the Income Tax Act

Toronto

November 16, 2016
Financial & Tax Planning

Montreal

November 17, 2016
Trips and Traps in Estate Administration
Study Session: Passport Holders Only

Calgary

November 23, 2016
Small Business and Professional Corporations Tax Update

Edmonton

November 24, 2016
US Inheritance – Implications, Taxes, Consequences

Vancouver

November 24, 2016
Estate Litigation: Avoiding It and Dealing With It If you Can't

Winnipeg

December 6, 2016
Owner – Manager Compensation

London & Southwestern Ontario

January 11, 2017
A Potpourri of Legal and Tax Issues Resulting From Recent Legislation Changes

Saskatchewan

January 18
Gender Implications in Intergenerational Wealth Transfer

Atlantic

January 19, 2017
Planning for Incorporated Professionals: A Multi-Disciplinary Panel

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