E-Newsletter Vol. 6
Issue 11 - November 13, 2018

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

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

Executive Trust Manager - Scotiabank, Toronto, ON

Regional Vice-President, Wealth Planning - Assante Private Client, Toronto, ON

Tax Associate - McInnes Cooper, Halifax, NS

VP, Trust – Concentra Bank, Saskatoon, SK

STEP Canada's Practitioner Opportunities service is a great resource for practitioners in the trust and estate industry who are seeking new

Education Center

Exam Sittings & Essay Intake Dates

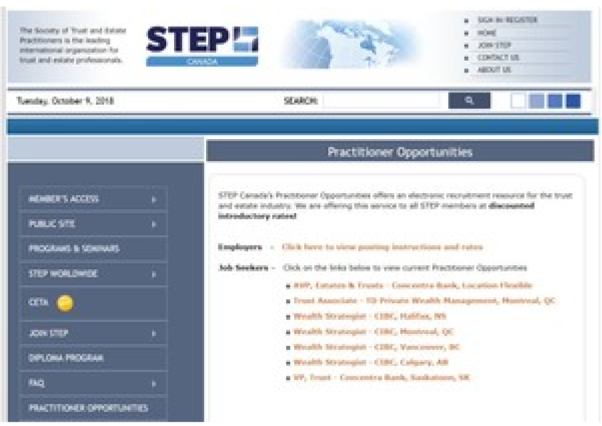
Education Program	Exam/Essay Dates
CETA	March 4, 2019 September 16, 2019
Assessment by Exam (Diploma Program)	May 13, 2019 November 4, 2019
Assessment by Essay	May 1, 2019 October 1, 2019

French Education Initiatives

The French language Diploma Program and CETA are open for registration. The *Diploma 3 Testaments et administration de fiducies et successions* will be released next month, December 2018. For more information regarding our French programs and 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. The STEP Canada 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 2,600 potential candidates. To learn more about this service, please click here.

Visit our online job board today!



www.step.ca/opportunity

Learn More

Certificate in Estate and Trust Administration (CETA)
CETA Marks have been distributed and are published in the e-classroom. Students can register for the next exam by clicking here, navigating to the “HOW TO ENROL” link, then clicking on the respective CETA course. Please contact education@step.ca if you have questions.

Assessment by Exam (Diploma Program)
Students that wrote an exam on November 5th can expect to receive their marks in 6-8 weeks.

Assessment by Essay
Students that submitted essays in October can expect to receive their essay mark by late-November. Please email education@step.ca if you have questions.

Mentorship Program & Study Groups
STEP Canada’s Mentorship Program matches students with TEP volunteers for additional support throughout program studies and professional career guidance. For more information and application details, please contact education@step.ca.

Students interested in forming a study group, please add your contact information to the online Study Partners Google Document. While STEP Canada does not formally arrange study groups or pairings, we hope this document will assist students in organizing their own meetings.

Contact Education

Registration NOW Open! 2019 STEP Canada Full-Day Course
Succession of the Family Business

Presented by: Cindy Radu, FCPA, FCA, LLB, LLM, ICD.D, FEA, TEP, Calgary; Deputy Chair, STEP Worldwide Business Families Special Interest Committee; Winner, 2018/19 People’s Choice – Trusted Advisor of the Year Award (13th Annual STEP Private Client Awards); Member, STEP Calgary

Course Description: This full-day course (8:30 am - 4:30 pm) is designed for Advisors who work with family businesses and family wealth transition. It provides an integrated frame of reference and presents a new approach to family business transition planning. As such, the course will be of interest regardless of area of specialization. A range of “hard” and “soft” topics will be covered from both advisor and family perspectives. Several case studies will be incorporated to illustrate concepts in context. This will be a full-day with opportunities for participants to dialogue and share experiences.

Highlights include:

- impact of working in silos
- introduction to governance
- common issues in family business shareholder agreements
- glitches in insurance planning
- unique financial planning challenges in family businesses

Course registration fees:

STEP Member	$545.00
Non-Member	$695.00
Course App	complimentary
Paper Binder	$80.00 (optional)

Course fee includes:

- 6.50 CPD hours
- user name and password to course app delivering all course material and most resource documents
- light breakfast, morning refreshment, buffet sandwich lunch, and afternoon refreshment
- in addition to course curriculum, comprehensive resource materials will be provided to every delegate, including a hardcover copy of *Complete Family Wealth* (James E. Hughes Jr., Susan E. Massenzio and Keith Whitaker: Wiley, 2017) for independent study and reference after the course date

2019 Full-Day Course Tour Dates:
Calgary - January 8 | Edmonton - January 10 | Winnipeg - January 29
Saskatoon - January 31 | Toronto - February 5 | Cambridge - February 7
Ottawa | February 19 | Montreal - February 21 | Kelowna - March 5
Vancouver - March 7 | Halifax - March 26

Register Now

STEP Canada / CRA Roundtables | 2004-2017

The STEP Canada/CRA Roundtable session at the annual national conference has been a crowd favourite since its conception in 2004. To commemorate our 20th anniversary, we collaborated with Wolters Kluwer to publish a collection of questions and answers from roundtable sessions held over the last 13 years. Edited by STEP members, Michael Cadesky and Kim Moody, this unique assemblage of roundtable highlights offers STEP members a resource of valuable information they can reference for years to come. To purchase your copy, please visit the Wolters Kluwer website, https://go.wolterskluwer.ca/step-book/.

21st National Conference 2019
STEP/CRA Roundtable Question Collection

The STEP/CRA Roundtable Committee invites you to submit questions for consideration. If selected, your question(s) will be presented during the annual roundtable session at the 21st National Conference. Please submit your question(s) to STEProundtablequestions@step.ca.

Save the date! STEP Canada's 21st National Conference is scheduled for Thursday and Friday, June 6-7, 2019 at the Metro Toronto Convention Centre.

Winners Announced!

The STEP Private Client Awards were presented last week in London, UK. This celebration is recognized 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.

We would like to extend our congratulations to the following Canadian winners:

Winner, 2018/2019 People's Choice - Trusted Advisor of the Year
Cindy Radu,TEP

Winner, 2018/2019 Multi-Family Office Team of the Year
GENn Family Office

Full List of Winners

"It's amazing to have this kind of recognition, especially on a global basis. STEP is a great brand and it becomes stronger as we continue to recognise the great work we are all doing in our specialist areas."
- Cindy Radu, TEP

The event raised nearly GBP72,000 for Operation Smile, contributions will be used to provide surgery for children and young adults born with cleft lip, cleft palate and other facial deformities throughout the developing world.

For more information about the Private Client Awards, please visit 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 2019 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.

For a listing of 2018 FEA designates and some fantastic testimonials from fellow TEPs, click here.

FAMILY ENTERPRISE XCHANGE fea FAMILY ENTERPRISE ADVISOR

For more information, please contact Renee Nelson:
rnelson@family-enterprise-xchange.com | 905-337-8375 ext. 260
Visit FEX online at family-enterprise-xchange.com/fea

Upcoming Industry Events

STEP Canada is promoting education this fall season, exhibiting at a number of industry events across Canada. If you're planning to attend an event listed below, please stop by the STEP Canada exhibitor booth and say hello! We're excited to connect with industry professionals to discuss our routes to membership and answer questions about the TEP designation and its many benefits. We encourage you to spread the word to potential members within your professional network.

- November 21 | Toronto | FPSC | Financial Planning Week
- November 22 | Quebec City | APFF | Midi-conférence
- November 23 | Vancouver | FPSC | Financial Planning Week Vancouver

STEP Referral Rewards

Help expand the STEP network! According to the 2017 STEP Members' Satisfaction Survey, 97% of STEP members would recommend the organization 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 (step.org) 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.

Upcoming Branch & Chapter Events

STEP Canada branches and chapters have an exciting 2018-19 program planned for this fall. The STEP Value Passport is also available for applicable branches and chapters. For more details, click here to access branch/chapter microsites.

Southwestern Ontario Chapter

Wednesday, November 14
Personal Pension Plan vs Individual Pension Plans

Toronto Branch

Thursday, November 15
Case Law and Legal Update

Winnipeg Branch

Tuesday, November 20
Overview from Experts on Valuation and Accounting Issues During Separation and Divorce

Ottawa Branch

Wednesday, November 21
Family Office - Family Planning

Saskatchewan Chapter

Wednesday, November 21
The Millennials on Trust and Advice

Atlantic Branch

Thursday, November 22
Fiduciaries Meet Firearms: Dealing With Unusual Estate Assets

Edmonton Branch

Thursday, November 22
Tax Update - The "Big Three" Issues for 2018

Montreal Branch

Thursday, November 22
Prolonged Administration of an Estate: Could This Replace Testamentary Trusts?

Vancouver Branch

Thursday, November 22
Tips, Traps, Trends and Techniques in Charitable Giving

Okanagan Chapter

Tuesday, November 27
Round Table Discussion: Coordinating Various Estate Planning Vehicles for Clients

Calgary Branch

Wednesday, November 28
Taxation of Private Corporations: Existing Structures, Common Questions, Practical Strategies and Solutions. Tips and Traps Arising in Traditional Structures, and Alternative Planning Considerations in the New Tax Landscape

Return to Top