

STEP Canada Insider

E-Newsletter Vol. 3
Issue 10 - October 13, 2015



Welcome to the STEP Canada Insider!

With access to the monthly STEP Insider, readers will receive the latest news about branch 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

[Associate Lawyer – Legacy Tax + Trust Lawyers, Vancouver](#)

[Public Trustee Representative – Alberta Human Services, Edmonton](#)

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

[Senior Advisor and Trust Officer – National Bank, Ottawa](#)

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

Education Center

Qualified Practitioner Route

Essay results are expected towards the end of October/beginning of November. Students will receive their marks via email.

Diploma Route

Trust and Estate Planning students (only): Exam location details for your **November 2** exam have been sent. Please contact education@step.ca if you have not received this information. All other Diploma students (Law of Trusts, Taxation of Trusts & Estates, Wills Trust & Estate Administration) write on **November 23**. Tutorial and exam location details will be sent out after Thanksgiving.

Certificate in Estate and Trust Administration (CETA)

Welcome to the STEP Canada student community to all CETA2 students! We look forward to your participation at local branch events and networking sessions.

[Senior Analyst, Trust Administrator – National Bank, Calgary](#)

[Senior Analyst, Trust Administrator – National Bank, Vancouver](#)

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

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

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

[Learn More](#)

Important Dates

October 14: [Fall Reception for Students](#) in Toronto at [Osgoode Hall](#), 5:00pm - 7:00pm (*complimentary*)

October 14: [Fall Reception for Students](#) in London at the [Hilton London Hotel](#), 5:30pm - 7:30pm (*complimentary*)

November 2: Diploma Program exam sitting for Trust and Estate Planning students only

November 23: Diploma Program exam sitting for (paper-based, report to exam centre):

- Law of Trusts
- Taxation of Trusts and Estates
- Wills, Trust and Estate Administration

November 23: CETA exams (proctored and written online):

- CETA1 - Foundations
- CETA2 - Advanced Topics

[Contact Education](#)

Regional Branch Programs 2015-16

STEP continues to deliver critical and relevant information essential to the trust and estate practice. We've started this education season with 10 successful events across the country. 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.

STEP Inside Conference Issue

The 2015 conference issue of STEP Inside, available in print and online, will be sent out to all members at the end of next week. Keep an eye on your inbox, and for those of you who have requested a printed copy, your mailbox. Included in the paper mailing is a listing of the latest industry topics being discussed at STEP branch events near you.

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.



The exam sitting for CETA1 and CETA2 is scheduled for **November 23, 2015**. Prepare yourself for examination day by taking advantage of our online CETA tutorial support, self-assessment quizzes, and

social media networking. The spring exam sitting will take place on May 30, 2016.

To register for CETA1 (Foundations of Estate and Trust Administration) and CETA2 (Advanced Topics in Estate and Trust Administration) courses, please visit the STEP Canada [website](#) for more information. For further inquiries, contact education@step.ca

STEP Canada Presents its 2015-16 Board of Directors

STEP Canada was pleased to announce the 2015-16 Board of Directors in the September 30th Report on Business, Globe & Mail. An electronic copy of the notice can be viewed [here](#).

Of Interest to Members

The Continuing Legal Education Society of British Columbia (CLEBC) and the Canadian Centre for Elder Law (CCEL) in collaboration, present the 2015 Canadian Elder Law Conference, The Journey of Aging – the Law and Beyond. This 2 day conference will take place on Thursday, November 12 and Friday, November 13, 2015 in Vancouver. [Click here](#) for more information.

Upcoming Industry Events

STEP Canada is raising awareness around the STEP organization by introducing university students to the specialization of trust & estate law. We'll be exhibiting at a number of career and education fairs across Canada this fall. You can also catch us networking with industry professionals at a selection of conferences and events in the months to come.

- October 22: [York University Graduate & Professional Studies Expo](#) (*exhibiting*)
- October 16: [CBA Will, Estate and Trust Fundamentals for Estate Practitioners](#) (*presenting*)
- October 26-27: [CTF's Ontario Tax Conference](#) (*exhibiting*)
- November 18-20: [FPSC Trust Matters CFP Professional Symposium 2015](#) (*exhibiting in Toronto & Vancouver*)

National Conference 2016 Dates

STEP Canada's 18th National Conference is scheduled for **Thursday, June 9 - Friday June, 10, 2016** at the [Metro Toronto Convention Centre](#). The 2016 National Conference Committee invites members to submit topic and presentation proposals to jarmstrong@step.ca for consideration.

2015/16 Upcoming Branch/Chapter Events

London & Southwestern Ontario

October 14, 2015

[The New Rules: Will You and Your Client Be Ready?](#)

Toronto

October 14, 2015

[Powers of Attorney](#)

Calgary

October 20, 2015

[How to Create and Understand a Proper Financial Plan](#)

Winnipeg

October 20, 2015

[Shareholder Agreement Planning: Protecting the Interests of Business Owners](#)

Ottawa

October 21, 2015

[Changes to Post-Mortem Planning, Wills and Taxation at Death: 2016 Onwards](#)

Edmonton

October 22, 2015

[Graduated Rate Estate - Tax, Planning and Charitable Ramifications](#)

Montreal

November 12, 2015

[New Trust Rules & Graduated Rates](#)

Vancouver

November 19, 2015

[So You've Been Named as
Executor/Trustee/Attorney – Now What?
Risks and Strategies for Acting in This Role](#)

Saskatchewan

January, 2016

[Estate Planning – Tips and Traps](#)

Atlantic

November 19, 2015

[Planning Through Incapacity](#)

Okanagan

January 13, 2016

[Estate Freezes & Trusts: Surprise! Your
Client Has US
Citizenship/Property/Children](#)

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