STEP Canada Insider

E-Newsletter Vol. 4
Issue 10 - October 11, 2016

Welcome to the STEP Canada Insider

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

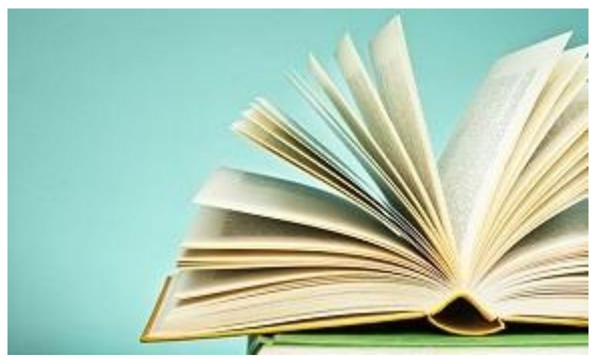
Click here to see the next regional branch/chapter event nearest YOU.

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

- Bilingual Estate and Trust Analyst – MD Financial Management, Ottawa, ON



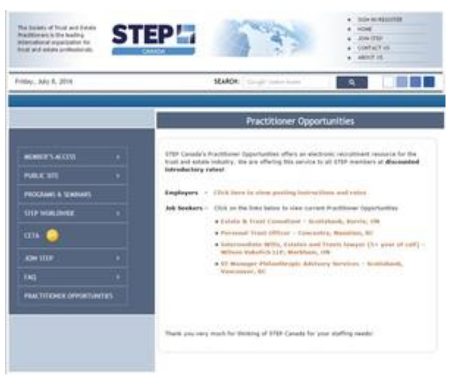
Education Center

STEP Canada has a NEW Education Coordinator
Please welcome Janet Castillo 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 here for contact information.

Certificate in Estate and Trust Administration

- Business Owner Specialist, High Net Worth Planning Services – RBC, Edmonton, AB
- Estate & Trust Consultant – Scotiabank, Winnipeg, MB
- Estate & Trust Specialist – Concentra, Nanaimo, BC
- Executive Trust Officer – TD Wealth Private Trust, Vancouver, BC
- High Net Worth Planner – TD, Calgary, AB
- Lead Legal Counsel – MacMillian Estate Planning Corp, Calgary, AB
- Manager, Private Trust – TD, Mississauga, ON
- Operations Manager – Legacy Private Trust, Toronto, ON



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

Learn More

(CETA)
CETA students, please visit the CETA webpage to register for the **March 6, 2017** CETA exams. The deadline to register is **November 28, 2016**.

CETA1-2nd Edition, Chapters 1-3 have been released. The complete 2nd Edition will be available by mid-November. Students enrolled in CETA1 will be expected to study the 2nd Edition. The Certification Exam will also be launching mid-November for students who have successfully completed CETA3.

Diploma Program
The next exam dates for the Diploma Program are scheduled for **November 28, 2016** and **May 29, 2017**. Exam locations and times will be sent out to students by the end of the month.

Tutorials for the November exams are scheduled as follows:

Trust & Estate Planning - Monday, October 31, 12:00PM-1:00PM(ET)

Law of Trusts - Tuesday, November 1, 12:00PM-1:00PM(ET)

Taxation of Trusts & Estates - Wednesday, November 2, 12:00PM- 1:00PM(ET)

Wills, Trust & Estate Administration - Thursday, November 3, 12:00PM -1:00PM(ET)

Qualified Practitioner Program
New essay topics are updated on the website for the next essay intake deadline on **May 1, 2017**.

Contact education@step.ca for more information on STEP's education programs.

Contact Education

Regional Branch Programs 2016-17

STEP continues to deliver critical and relevant information essential to the trust and estate practice. We've started this education season with nine successful events across the country. Take advantage of our educational programs by purchasing the STEP Value Passport, a members only pass to events in your area at a discounted rate (available for select STEP branches). To purchase the passport, or register for an event, please visit the Programs & Seminars section of the STEP Canada website and click on your branch location for event listings.

ANNOUNCING a 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:
Halifax – October 27
Montreal – November 2
Calgary – November 8
Edmonton – November 10
Winnipeg – November 15
Toronto – November 29
Ottawa – January 26, 2017
London – Winter TBA, 2017
Saskatoon – Winter TBA, 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!

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**.

Digital Assets Working Group (DAWG)'s New Guide to Understanding Digital Assets

The STEP Worldwide Digital Assets Working Group was established to address emerging issues for STEP practitioners, provide learning and resources, and campaign for greater clarity and uniformity in international laws, and the terms and conditions of internet service providers. Click here to view the newly published Digital Assets Guide for key information on what's considered a digital asset and why they're so important. Keep up-to-date on the latest developments in digital assets by visiting DAWG's newly launched webpage.

STEP Worldwide Introduces New Learning Opportunities for Members

STEP has introduced a new "STEP CPD Learning" series of short courses, covering technical and non-technical subjects. The courses are online and on-demand, so you can access and study the materials without waiting for set course dates. There is no assessment at the end of the course.

FATCA: Law & Practice is the first course in the series and takes an average of 10 hours to study. It is designed to help practitioners understand the Foreign Account Tax Compliance Act (FATCA), Intergovernmental Agreements (IGAs), “UK FATCA” and the Common Reporting Standards (CRS). Click here to view the brochure. For a full syllabus and to enrol, please visit the CLTI website.

Anti-Money Laundering is a certificate course that provides you with all of the essential knowledge needed to establish a successful career in this field, no matter where you are located. Register online, or download the enrolment form.

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.”

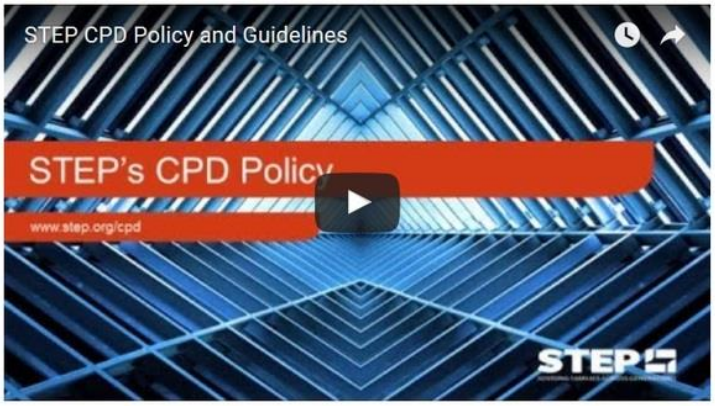
- Kathy M. Munro, FCPA, FCA, FEA, TEP; PwC Partner, Tax

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

STEP's CPD Policy

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 downtown Vancouver at the Canadian Tax Foundation's British Columbia Tax Conference, or in Richmond, BC at the Institue for Advanced Financial Planners 14th Annual Symposium. 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!

- October 24-25: Canadian Tax Foundation's Ontario Tax Conference
- October 27: STEP Vancouver & CPABC's Estate Planning Conference Day
- November 23: FPSC Financial Planning Week, Toronto Symposium
- November 25: FPSC Financial Planning Week, Vancouver Symposium

STEP Inside Conference Issue

The 2016 conference issue of STEP Inside, available in print and online, will be sent out to all members this month. 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 and chapter events near you.

2016 Upcoming Branch/Chapter Events

Ottawa

October 19
A Taxing Agenda: Planning for Professional Partnerships – Changes to the SBD Rules, and 55 (2) Update

Toronto

October 19
Attacking and Defending Gifts

Calgary

October 20
Obligations of Executors/Trustees/Attorneys (under a Power of Attorney) to Properly Account

Montreal

October 20
Voluntary Disclosure

Winnipeg

Edmonton

October 25
Trusts and the 21-Year Rule

October 27
Medical Assistance in Dying (MAID) – Panel Discussion

London

November 1
Personal Tax Update 2016: Recent Canadian & US Developments

Okanagan

November 10
Practical and Tax Issues of Settling a Trust & Presentation of Subsection 75(2) of the Income Tax Act (Round Table discussion)

Vancouver

November 24, 2016
Estate Litigation: Avoiding it and Dealing With it if You Can't

Saskatchewan

January 18
Gender Implications in Intergenerational Wealth Transfer

Atlantic

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

Return to Top