E-Newsletter Vol. 6
Issue 10 - October 9, 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.

AVP, Estates & Trusts - Concentra Bank, Location Flexible

Trust Associate - TD Private Wealth Management, Montreal, QC

VP, Trust – Concentra Bank, Saskatoon, SK

Wealth Strategist - CIBC, Calgary, AB

Wealth Strategist - CIBC, Halifax, NS

Wealth Strategist - CIBC, Montreal, QC

Education Center

Exam Sittings & Essay Intake Dates

Education Program	Exam/Essay Dates
CETA	March 4, 2019 September 16, 2018
Assessment by Exam (Diploma Program)	November 5, 2018 May 13, 2019
Assessment by Essay	October 1, 2018 May 1, 2019

French Education Initiatives

The French language CETA and Diploma programs are open for registration. For more information regarding our French programs, please visit www.step.ca/french.

Certificate in Estate and Trust Administration

Wealth Strategist - CIBC, Vancouver, BC

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.

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

(CETA)
CETA1 marks from the September exam are posted in the e-classroom. CETA2-4 marks will be posted in the next few weeks. 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)
Exam tutorials for the November 5 exam are now complete. If you missed the live tutorial, you can now access the archived version via student resources. Please follow the exam software download instructions, which were emailed to students last week. It is strongly encouraged to download the software and take the mock exam in advance of the exam day to troubleshoot possible issues.

Assessment by Essay
The October intake essays are in the process of being marked. Students can expect to receive their essay mark by the end of December. Essay requirements can be viewed here. 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

Mark Your Calendar! 2019 STEP Canada Full-Day Course Succession of the Family Business

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

Course Description: This full-day course (8:30 am - 4:30 pm) 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 (*Complete Family Wealth* provided in hardcopy only)
- 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

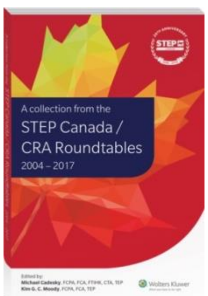
2019 Full-Day Course Tour Dates:
Calgary - January 8 | Edmonton - January 10 | Winnipeg - January 29
Saskatoon - January 31 | Toronto - February 5 | Cambridge - February 7
Ottawa | February 19 | Montreal - February 21 | Kelowna - March 5
Vancouver - March 7 | Halifax - March 26

Keep an eye on your inbox for the invitation as registration will open later this month. Please keep in mind, pre-registration is required and capacity is limited to 45 delegates per location.

CPABC & STEP Vancouver Present:
Estate Planning Insights 2018

Please join us on Tuesday, October 23rd for CPABC and STEP Vancouver joint conference. This special 1 day event will provide participants with up-to-date, practical, and leading-edge estate-planning information, as well as access to highly-regarded speakers covering current and relevant estate-planning issues. The day will include a plenary presentation in the morning, breakout sessions throughout the day, and another plenary presentation in the afternoon. Don't miss out this opportunity to meet and network with fellow estate-planning practitioners. Click here for the full agenda and list of speakers. For event details and registration, please visit the CPABC website.

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.

STEP Private Client Awards 2018

The STEP Private Client Awards are seen 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.

The 2018 list of finalists is now available for public viewing. Best of luck to the following Canadian finalists:

People's Choice - Trusted Advisor of the Year
Cindy Radu, BDO

Contentious Trusts and Estates Team of the Year (large firm)
Borden Ladner Gervais

Contentious Trusts and Estates Team of the Year (midsize firm)
Hull & Hull

Financial Advisor Team of the Year
Woodgate Financial Inc.

Multi-Family Office Team of the Year
GENn Family Office

The award ceremony attracts over 700 private client practitioners and offers exceptional networking opportunities. This year's awards ceremony will be held on November 7, 2018 in London, UK.

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 of within your professional network.

- October 22-23 Toronto | | CTF | Ontario Tax Conference

- October 23 Vancouver | CPABC/STEP Vancouver | Estate Planning Insights
- November 8 | Quebec| CTF/HEC | Évolution de la profession de fiscaliste
- November 21 | Toronto | FPSC | Financial Planning Week
- November 22 | Montreal | APFF | Midi-conférence
- November 23 | Vancouver | FPSC | Financial Planning Week Vancouver

STEP Inside Conference Issue

The 2018 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 nearest you.

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 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.

Toronto Branch

Wednesday, October 10
Dealing with Challenges in Will and Trust Administration

Okanagan Chapter

Tuesday, October 11
Joint Tenancy Issues in Estate Planning

Ottawa Branch

Wednesday, October 17
The CCPC Tax Changes: Passive Income Strategies

Southwestern Ontario Chapter

Wednesday, October 17
Private Corporation Planning Under the New Rules: Opportunities and Limitations; Followed by a 5th Anniversary Celebration

Atlantic Branch

Thursday, October 18
Tips, Traps, and Opportunities when International Comes into the Picture

Winnipeg Branch

Thursday, October 18
Charitable Planning Update

Vancouver Branch

Tuesday, October 23
CPABC and STEP Vancouver Joint Estate

Calgary Branch

Thursday, October 25
The Changing Face of Philanthropy:

Planning Insights Conference Day

Fundraising, Finance and the Evolution of Doing Good

Edmonton Branch

Thursday, October 25
Ethical Dilemmas

Montreal Branch

Thursday, October 25
Technical and Personal Issues in Transferring Family Wealth

Saskatchewan Chapter

Wednesday, November 21
The Millennials on Trust and Advice

Return to Top