STEP Canada Insider

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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

- Associate Director, Gift & Estate Planning – University of British Columbia, Vancouver, BC
- Associate Lawyer – Legacy Tax + Trust Lawyers, Vancouver, BC

Education Center

French Education Initiatives

French language courses with a civil law focus will launch this fall for both the CETA and Diploma programs. Click here for more information or contact education@step.ca.

Certificate in Estate and Trust Administration (CETA)

The upcoming CETA exams are scheduled for **September 18, 2017**. If you are writing this exam, please ensure that you have tested all your system requirements prior to exam day. If you did not receive the email explaining the online proctoring instructions, please email education@step.ca. As part of your studying, we strongly encourage you to review the chapter

- [High Net Worth Planner – TD Wealth Management, New Brunswick]
- [Private Client Portfolio Manager – Alitis Investment Counsel, Victoria, BC]
- [Senior Associate Director, Gift & Estate Planning – University of British Columbia, Vancouver, BC]
- [Senior Trust & Estate Consultant – CIBC, Winnipeg]

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

Learn More

questions and take the sample exam.

Diploma Program

The next set of exams will be held on **November 27, 2017** (in English) and **May 14, 2018** (in English and French). To register for your exam, please click here. Please note, STEP study guidelines recommend four to six hours of study time per week, or a total of 120 hours in preparation for each exam.

Qualified Practitioner Program

The next essay intake date is **October 1, 2017**. Essay topics must be selected from the pre-approved list of topics on the STEP Canada website.

Mentorship Program

The STEP Canada Mentorship program is continuing in the fall term for Diploma students. If you are a new student who has filled out the mentorship survey, please note that matches are currently being made and your local branch/chapter student liaison officer will be in touch to make introductions. Please email education@step.ca should you have any additional inquiries.

Contact Education

Registration NOW Open! STEP Canada Full-Day Course: Taxation at Death and Post Mortem Planning

Presented by: *Chris Ireland, CPA, CA, TEP, Vancouver: PPI Advisory; Deputy Chair, STEP Canada*

The course will review various tax and legal issues pertaining to post mortem planning for the ownership of private company shares and other taxation on death issues, specifically:

Taxation on death – an overview of the deeming rules; review of the various rollovers on death and the QSBC exemption; review of the rules pertaining to certain special assets – registered plans, rental real estate, principal residence; charitable donations; and a review of the various terminal returns.

Post mortem planning for private company shares – three case studies; illustrating the three levels of tax; overview of the post mortem planning alternatives (including the impact of the July 18, 2017 Federal Government proposals); a review of the Income Tax Act provisions that could apply; tax rate considerations; general rules and planning considerations; detailed review of the case studies; hybrid planning and whether or not it is still possible; stop-loss rules; “short snappers” for the tax and legal considerations; review of a post mortem planning decision tree; and an overview of the reference materials. US content will be limited to issue identification and not a detailed review.

Registration fees include 7.0 technical hours of CPD; binder & USB of course materials; reference resources; refreshments and buffet lunch. Registration opens at 8:30 am; course begins at 9:00 am; course adjourns at 4:30 pm.

Exclusive to registrants of this course – specific areas of this course material affected by the final outcome of the July 18, 2017 Department of Finance consultation paper and draft legislation will be summarized with planning considerations in early-spring via webcast featuring Chris Ireland.

STEP Member **$495.00 + tax**
Not a STEP Member **$645.00 + tax**

Capacity limited to 45 students.

Click the button below to register.

Register Now!

Coming to your area:

Date	Branch/Chapter	Location
September 14 2017	Vancouver SOLD OUT	UBC Robson Square, Vancouver
September 19 2017	Okanagan	Hotel Eldorado, Kelowna
October 5 2017	Atlantic	Casino Nova Scotia, Halifax
October 26 2017	Calgary	The Ranchmen's Club, Calgary
November 15 2017	Edmonton	Royal Glenora Club, Edmonton
November 23 2017	Saskatchewan	Delta Bessborough, Saskatoon
December 5 2017	Toronto ONLY 2 SPOTS LEFT!	Ivey Leadership Centre, Toronto
December 7 2017	London & SWO	Four Points by Sheraton, Cambridge
January 23 2018	Montreal	TBC
January 25 2018	Ottawa	TBC
February 1 2018	Winnipeg	Fairmont Winnipeg, Winnipeg

RE: The STEP Canada Special Symposium - The Tax Technical Committee and Public Policy Committee Actions Thus Far

On behalf of its members, on Thursday, August 17, 2017 STEP Canada held a special symposium to explore potential impact of the July 18, 2017 Department of Finance Discussion Paper and Draft

Legislation. Senior level representatives from many organizations were invited. The proceedings provided the framework for STEP's comprehensive submission to Finance on the proposals, as well as facilitated the development of a cooperative and coordinated course of action for all of the professional organizations who were represented. The STEP Canada Tax Technical Committee and Public Policy Committee provided the day's program and presentation materials, along with the Media Advisory that was sent to media outlets across the country in a recent eNews email that was shared with all STEP members on August 18. A follow-up message will be sent to members which will include the Symposium outline and press release; a series of examples which show many of the problems with the proposals; and a letter written and sent to the Minister of Finance. Keep an eye on your inbox for this very informative eNews email!

12th Annual STEP Private Client Awards - Winners Announced!

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 awards ceremony took place on September 6 at the Park Plaza Westminster Bridge Hotel in London, UK, and the 2017/18 list of winners is now available for public viewing!

The 2018/19 awards will open for entry on March 1, 2018, and the awards ceremony will be held on November 7, 2018 at the same venue location. For more information on the Private Client Awards, please visit www.steppca.org.

STEP Worldwide Annual CPD Audit

STEP Worldwide will be contacting a random selection of members this month for the annual CPD audit. STEP requires that all members keep CPD records for a minimum of 3 years, and selects up to 5% of members worldwide for the annual audit. STEP will contact selected members by email and post. If you're contacted, you will need to provide records covering a 12-month period, as specified in the letter or email received. If you have questions regarding the audit, please email cpd@step.org.

STEP/CRA Round Table Question Collection

The STEP/CRA Round Table Committee invites your questions for consideration at the next round table. Please submit your question(s) to STEProundtablequestions@step.ca.

20th National Conference 2018

Mark your calendars! STEP Canada's 20th National Conference is scheduled for Monday and Tuesday, May 28-29, 2018 at the Metro Toronto Convention Centre. If you have an idea for a panel, please send a proposal including subject title, description of idea/session, and if applicable possible speaker(s) to jarmstrong@step.ca

2017-18 Branch/Chapter Events

STEP branches and chapters have opened registration for September seminars! The STEP Value Passport is also available for purchase (select branches only). Click here to access the branch/chapter microsites for more details and registration.

Upcoming 2017-18 Branch/Chapter Events

London & SWO Chapter

Wednesday, September 13
Pro-Active Planning for the Changes to the Taxation of Small Businesses

Toronto Branch

Wednesday, September 13
Intersection of Family, Tax, and Estate Law

Montreal Branch

Thursday, September 14
Trust & Estates – Valuation Issues in Light of Recent Case Law

Winnipeg Branch

Tuesday, September 19
Millennials and Advice

Calgary Branch

Wednesday, September 20
Leaving Canada – Tax & Non-Tax Aspects of Emigration

Saskatchewan Chapter

Wednesday, September 20
2017 Tax Update

Edmonton Branch

Thursday, September 21
Private Lives and Deaths

Ottawa Branch

Tuesday, September 26
Digital and Other Interesting Assets: POA and Executor Considerations

Vancouver Branch

Thursday, October 26
Important Recent Changes Affecting Small Business and Professional Corporations
Cocktail Reception to follow

Okanagan Chapter

Wednesday, November 22
Multiple Will Planning for Individuals with Private Company Shares

Atlantic Branch

Thursday, November 23
Practical Guidance for Trust Administration

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