



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

Current Career Opportunities

Visit our [online job board](#) any day of the week for the most up-to-date job postings.

Associate Trust Officer – Scotiabank, Vancouver, BC

AVP, Estates & Trusts – Concentra Bank, Location Flexible

Regional Estate and Trust Administrator – MD Private Trust (MD Financial Management), Toronto, ON

Senior Estates Accounting Professional – WEL Partners, Toronto, ON

Strategic & Operations Consultant, Estate & Trust Services – Raymond James Ltd., Toronto, ON or Vancouver, BC

Education Center

Exam Sittings & Essay Intake Dates

Education Program	Exam/Essay Dates
CETA	September 17, 2018 March 4, 2019
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 (CETA)

Good luck to all students writing their CETA exam on September 17th. Please look out for exam login instructions this week. It is important

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](#).

[Learn More](#)

that you have already tested your system for online proctoring to ensure you are set up on exam day. Should you have any questions, please contact education@step.ca. To register for an upcoming CETA exam, [click here](#).

Assessment by Exam (Diploma Program)

We are now accepting registrations for the November 5 and May 13 exam sittings. To register for the English (common law) exam, [click here](#). To register for the French (civil law) exam, [click here](#). A reminder that the exams are in an electronic format and must be answered online. Look out for instructions on how to download the exam software in the coming weeks.

Assessment by Essay

[Click here](#) for the October 1 pre-approved list of essay topics. Please email education@step.ca if you have essay submission questions.

[Contact Education](#)

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



Presented by: *Cindy Radu, FCA, LLM, TEP, ICD.D, FEA, 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	<i>complimentary</i>
Paper Binder	\$80.00 (<i>optional</i>)

Course fee includes:

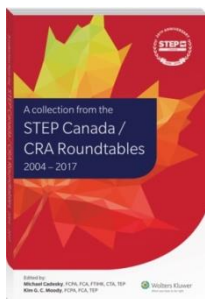
- 7.50 CPD hours
- user name and password to course app delivering all course material and most resource documents (Complete Family Wealth provided in hardcopy only)
- light breakfast, morning refreshment, buffet sandwich lunch, and afternoon refreshment
- in addition to course curriculum, comprehensive 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.

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/>.

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 Global Congress 2018

STEP's third Global Congress is just days away! For event details and registration, please [click here](#).



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](#).



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

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 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. All September events are now open for registration, with October and November events scheduled to open shortly. The Value Passport is now available for applicable branches and chapters. For more details, [click here](#) to access branch/chapter microsites.

Toronto Branch

Thursday, September 13
[Tax Planning for Private Corporations - What's Left?](#)

Saskatchewan Chapter

Wednesday, September 19
[Tax on Split Income \(TOSI\) Update](#)

Vancouver Branch

Thursday, September 20
[Implications of Offshore Trusts for Domestic Clients: The Why, What, How of Your Client's Offshore Trusts](#)

Ottawa Branch

Wednesday, September 26
[Avoiding and Dealing with Insolvent Estates](#)

Southwestern Ontario Chapter

Wednesday, October 1
Seminar details available at a later date.

Atlantic Branch

Program and passport details available at a later date.

Winnipeg Branch

Tuesday, September 18
[Tax on Split Income \(TOSI\) Rules](#)

Edmonton Branch

Thursday, September 20
[Blended Families and Matrimonial Issues in Estate Planning](#)

Calgary Branch

Wednesday, September 26
[Top Five Topics in Canada/US Estate Planning](#)

Okanagan Chapter

Thursday, October 11
[Joint Tenancy Issues in Estate Planning](#)

Montreal Branch

Thursday, October 25
[Technical and Personal Issues in Transferring Family Wealth](#)

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Contact Us | Phone: 416-491-4949 ext.221 | Toll-free: 1-877-991-4949 | www.step.ca