

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 branch activity, national conference updates, practitioner opportunities, education, and more!

Practitioner Opportunities



STEP Canada's [Practitioner Opportunities](#) offers an electronic recruitment resource for the trust and estate industry. We are offering this service to all STEP members at discounted rates!

Executive Vice President – Concentra Trust, Saskatoon

Aboriginal Trust Advisor – RBC Wealth Management, Estate & Trust Services, Calgary or Edmonton

Trust Officer, Aboriginal Trust Services – RBC Wealth Management, Winnipeg and Calgary

Education Center



NEW EDUCATION OFFERING!

STEP Canada's new Trust and Estate Administration Program will be launched this fall!

This new certificate program will be geared to individuals who are contemplating a career in Trust and Estate Administration or who have already secured employment in this field but want to deepen or refresh their knowledge and expertise. The course will be of value to estate administration staff in trust companies, law firms, retail banking, paralegals and community college graduates, to name a few.

Enrollment will begin in November 2014. Further details (including curriculum, course fees, and exam structure) will be issued as soon as possible. In the interim, please direct any questions to Lisa Lue at llue@step.ca.

STEP Worldwide Resources Update

We would like to bring members' attention to the resource enhancements that have been made to the [STEP Worldwide website](#).

1. **STEP Journal:** All members can access back issues through the STEP website [here](#). In addition to the regular technical content, each issue of the Journal contains articles that are student-focused.
2. **Information on other jurisdictions:** Members who are studying or involved in cross-border estates may find the [jurisdictional reports](#) useful along with [industry news](#) in the [Resources Section](#). The [Policy Section](#) is useful for checking FATCA-related news and the list of government consultations that STEP Worldwide and some STEP branches have responded to.
3. **STEP Forums:** STEP has created a [forum](#) for all members, which allows you to participate in discussion boards on various topics. You will need your STEP login details to access this area. Should you require assistance, please email Member Services at memberservices@step.ca or call 416-491-4919 ext. 221.
4. **New CPD Centre:** Under the [Professional Development Section](#), there are now 2 free resources available to members to help you meet your CPD Requirements. [Alchemy for Managers](#) is a library of materials designed to offer members practical support in a range of key professional skills, and [ESBCO](#) is a database of respected business magazines, trade publications and management journals.

STEP Okanagan Chapter Launch Event & WESA Birthday Party Recap

March 31 marked the official launch of the new Okanagan Chapter. Over 60 practitioners attended the launch event which featured a networking reception and a technical session delivered by members Margaret O'Sullivan, Chris Ireland, Pam Prior and the new Chapter's Chair, Geoffrey White. The Chapter will provide high level technical education and networking opportunities to the 250+ Okanagan area members and non-members whose practices include trust and estate work. The Chapter's next event will take place in June.

Photos taken during the Okanagan Chapter launch reception



Leadership team L to R: Geoffrey White, Melodie Lind, Peter Ranson, Alixon Oxtoby and Dan Basso.



16th National Conference

Registration is open for the 16th National Conference taking place on **Monday–Tuesday, June 16–17** in Toronto. The [final program](#) has been released and can be found on our [website](#).

STEP is excited to announce the first STEP Canada Conference App. It is currently in production and will be released prior to the conference.

For conference [sponsorship opportunities](#), please contact Janis Armstrong, Director of Business Development, at jarmstrong@step.ca

Calgary

April 16
Investing Estate & Trust Assets: What does the Prudent Investor Rule mean Practically?

Vancouver

May 8
Medical vs. Legal –Impact of Incapacity on Health Care Decisions

Atlantic

May 15
Are Testamentary Trusts Dead? – followed by Annual General Meeting

Edmonton

May 22
Annual General Meeting and Year End Wind Up

London & Southwestern Ontario

May 22
Impact of the Budget changes and revisiting Probate and Privacy planning

Toronto

April 17
Building Your Competencies Beyond Your Professional Skills

Winnipeg

May 13
Testamentary Trusts: A Review and Update

Ottawa

May 21
Government Position on Testamentary Trusts and Some Innovative Ways of Dealing with the Potential Changes

Montreal

May 22
Estate Planning for Second Marriages

Okanagan

TBA June