

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!

Next Scheduled Branch Events

Montreal December 18 Liability of Liquidators/Executors and Conflict of Interest Concerns	Toronto January 16 Cross-Border Estate Planning, Tax, New Developments
Winnipeg January 21 Freezing an Investment Portfolio: the Pros, Cons and Process	Calgary January 21 Review Asset Protection Options
Ottawa January 22 Voluntary Disclosures: Coming Clean with CRA and Uncle Sam	Vancouver January 23 The Year in Review followed by a Wine and Cheese Reception
Edmonton January 30 Changes to U.S. Taxation	Atlantic February 13 21 Year Deemed Disposition Rule: Planning and Tactics

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!

Current Ad(s):

[Cidel - Office Administrator/Trust Administrator, Calgary AB](#)

[United Financial - Estate Planning Lawyer - Winnipeg, MB](#)

Education Center



2013 was a great year for Education with 45 students graduating from the QP and Diploma programs. Congratulations to all! Diploma exam dates have been set for Monday, May 26, 2014 and Monday, November 24, 2014 and enrollment is currently open.

16th National Conference Topics

Thank you to all the members who submitted topic ideas for the 16th National Conference. The committee will discuss and consider all suggestions.

Make sure to save the dates in your calendar - Monday-Tuesday, June 16-17, 2014, Toronto.

Family Business Special Interest Group

STEP's Family Business Special Interest Group was created to recognize the growing prominence of family businesses. The group focuses on what makes family businesses distinct and their particular challenges. STEP members can join this special group for free and enjoy many benefits including receiving dedicated family business publications and newsletters, and discounts on webinars and events.

For more information on benefits and joining this group, please visit step.org/business-families

Happy Holidays from the STEP Canada Staff

The STEP Canada Staff would like to wish all of our valued members a safe and happy holiday! We look forward to seeing you in 2014!



STEP Canada Staff volunteering at the Annual Gift Basket Drive benefiting Women's Shelters in the GTA.