



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

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| <p>Toronto February 13 Current Cases and CRA Developments</p> <p>February 27 Coming and Going: US/Canada Cross-border Immigration Planning – Special Video Conference Joint Event with STEP New York</p> | <p>London and Southwestern Ontario February 24 Foreign Assets in Canadian Estates – Joint Dinner Event with the Estate Planning Council of London</p> |
| <p>Atlantic February 13 The Twenty-One Year Rule: Planning and Trustee Fiduciary Obligations</p> | <p>Winnipeg February 18 US Cross Border Issues</p> |
| <p>Edmonton February 18 Recent Developments – Insurance Policy Tax Rules</p> | <p>Montreal February 19 Global Cross Border – Estate Planning STUDY SESSION</p> |
| <p>Calgary February 19 Insurance Case Studies: Update on Changes to Tax/Insurance Legislation</p> | <p>Vancouver February 27 WESA –Practical Implications for Estate and Trust Practitioners</p> |
| <p>Ottawa March 4 2014 Trends in Private Philanthropy</p> | <p>Okanagan March 31 Okanagan Chapter Launch Event & WESA Birthday Party</p> |

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!

Education Center



Congratulations to all student award recipients for 2013! Students who have earned the **highest mark** in the [STEP Canada Diploma Program](#) and [Qualified Practitioner](#) route are granted these awards.

These honours will be presented during the 2014 [National Conference](#) taking place on June 16 & 17.

Law of Trusts

Justin Hoffman

Taxation of Trusts and Estates

Katy Basi

Wills, Trust and Estate Administration

Claudia Sgro

Trust and Estate Planning

Paul van Galder

Qualified Practitioner Essay

Jagruti Gandhi

The **Gerald W. Owen Award** is awarded to the student of STEP who achieves the highest overall combined mark of all four STEP Canada Courses.

This year's award goes to Rishma Jessa.

Membership Renewal

Annual membership fees for the 2014–15 year are due April 1, 2014. Renewal letters will be sent via Canada Post early March, payments can be made online or through the STEP Canada office. STEP continues to deliver opportunities of unparalleled education, representation and networking.

STEP Okanagan Chapter Launch Event & WESA Birthday Party

STEP Canada is pleased to announce the launch of a new chapter in the Okanagan area. Poised for incredible growth, the Okanagan chapter has scheduled their launch event for Monday, March 31 at the Hotel Eldorado in Kelowna. The launch event aims to bring together the trust and estate practitioners in the community with a networking reception followed by a top-notch technical presentation by local, regional, and national speakers who will discuss WESA, on the very day it comes into force in BC.

16th National Conference

Plans for the 16th National Conference are well underway. This year's national conference will be taking place on **Monday–Tuesday, June 16–17** in Toronto.

Information for sponsorships opportunities can be found on our website www.step.ca. For all inquiries, please contact Janis Armstrong, Director of Business Development, at jarmstrong@step.ca

Preliminary program is scheduled for release later this week.