



## 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

Toronto January 16 Collection of Canada/US Estate and Tax Planning Strategies	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
Montreal January 22 Philanthropy - Planned Giving	Vancouver January 23 The Year in Review, followed by a Wine & Cheese Reception
Edmonton January 30 Changes to US Taxation	Atlantic February 13 21 Year Deemed Disposition Rule: Planning and Tactics
London and Southwestern Ontario February 24 Foreign Assets in Canadian Estates	

## 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



Calling all May 26, 2014 exam writers! Want to get a jump start on studying for the next Diploma exam? Looking for a study buddy? Click [here](#) get your name added to the list of people who are looking for like-minded individuals wishing to study together and share ideas. Writing in November? A new study partner list will be circulated at the end of May.

Know someone who might benefit from the STEP Diploma program? Please contact [Lisa Lue](#) for more info.

## Happy New Year!

STEP Canada would like to wish all of our members Happy New Year! We look forward to continuing to promote our organization and the **TEP designation** to both the industry and public. We are always happy to hear from you and welcome any ideas, suggestions and concerns you may have.

## 2013 STEP Worldwide Founders Award

The STEP Founder's Awards for Outstanding Achievement are awarded to members who have made an exceptional and outstanding long-term contribution to the Society above and beyond that normally expected of a member through office in their branch or elsewhere in the voluntary life of the Society. Three STEP Canada members received this honour at the recent Worldwide Leadership Forum in London: **Barry Gorman** of the Atlantic Branch; **Larry Frostiak** of the Winnipeg Branch; and **Kim Moody** of the Calgary Branch.

## 16th National Conference

Now that you have your 2014 calendars out, please note the dates for this year's national conference are **Monday–Tuesday, June 16–17** in Toronto.

Preliminary program is scheduled for release in early February.

Contact Us | Phone: 416-491-4949 ext.221 | [www.step.ca](http://www.step.ca)