

STEP Canada Insider

E-Newsletter Vol. 2 Issue 3 March 11, 2014



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.

Membership Renewals for 2014-2015 season

Renewal letters have been sent out to all members via Canada Post. Payments can be made online or through the STEP Canada office.

STEP Okanagan Chapter Launch Event & WESA Birthday Party Registration Opens

Join STEP in celebrating the new Okanagan chapter and welcoming WESA on Monday, March 31 at the Hotel Eldorado in Kelowna. Click [here](#) for full event details and registration information.

16th National Conference

Registration is now open for the 16th National Conference taking place on **Monday–Tuesday, June 16–17** in Toronto. The [Early Bird Registration](#) ends on March 31 offering a savings of \$100.

The Preliminary Program has been released and can be found on our website www.step.ca

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

Next Scheduled Branch Events

Montreal March 12 Elder Care and Asset Protection: A Different Perspective March 19 Tax Issues for Americans owning or having an interest in a Canadian life insurance policy	Calgary March 18 Importance of Implementing Estate/Business Plan and How To Fix if not Properly Implemented
Winnipeg March 20 Charitable Giving Strategies	Edmonton March 27 All About Wills- Multiple Wills
Okanagan March 31 STEP Okanagan Chapter Launch Event and WESA Birthday Party	Vancouver April 3 Medical vs. Legal –Impact of Incapacity on Health Care Decisions
Toronto April 17 Building Your Competencies Beyond Your Professional Skills / How to Support a Grieving Client	Atlantic May 15 Are Testamentary Trusts Dead? – followed by AGM
Ottawa May 21 Government Position on Testamentary Trusts and Some Innovative Ways of Dealing with the Potential Changes	London & Southwestern Ontario Date TBD