

STEP Canada Insider

E-Newsletter Vol. 1 Issue 8 November 12, 2013



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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| Edmonton Thursday, November 14 Part #1 Estate and Tax Planning in Complex Family Situations /Part #2 New Reforms – Canadian Securities Administrators | Calgary Tuesday, November 19 Trust Drafting Tips and Traps – including the Impact of US Family Members and Maximizing Charitable Credits |
| Montreal Wednesday, November 20 Issues Relating to US and Canadian Voluntary Compliance and Offshore Compliance Enforcement | Atlantic Thursday, November 21 Family Business: Succession and Governance |
| Winnipeg Thursday, November 21 Trustee Investing in Hard Times | Vancouver Thursday, November 21 US Family Members: Impact on Canadian Corporate and Trust Structures |
| Ottawa Wednesday, November 27 Conflict of Laws in Estates and Trusts | Toronto Tuesday, December 10 Seasonal Event Cocktails and Hors d'oeuvres Reception |

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



Marks for qualified practitioner essays and diploma exams are expected no later than the end of November. Students will be notified of their result via email as soon as the mark is received. For more information, please contact education@step.ca.

Save the Dates!

STEP Canada's 16th National Conference will take place Monday-Tuesday, June 16-17, 2014 in Toronto. Is there a topic you want to hear about at the conference?

Please send session topic ideas to jarmstrong@step.ca on or before December 6, 2013. The committee will consider and discuss all suggestions but please keep in mind there is a limited number of session slots available so all suggestions may not be selected for the 2014 conference.

London & Southwestern Ontario Chapter Launch Event Recap

The London & Southwestern Ontario Chapter launch event took place on Thursday, October 17 and attracted over 100 attendees from the surrounding area. The event began with a networking reception followed by a panel of high profile speakers addressing hot issues in trust, estate, tax and family law.

The new chapter will be lead by an executive committee consisting of *Michael Bondy, Chair; Diane Wood, Deputy Chair; Angelique Ellerton, Treasurer and Member Services Officer; Chis Delaney, Programs Officer; and Tracy VanParys, Student Liaison Officer.*



Over 100 practitioners attended the networking reception at the London & Southwestern Chapter Launch.

STEP at Ontario Tax Conference and Financial Planning Week

On October 28 and 29, STEP exhibited at the Canadian Tax Foundation's [Ontario Tax Conference](#) and engaged with a number of delegates who took a high interest in becoming a member with STEP Canada.

STEP is a sponsor of the [Financial Planning Standards Council](#)'s upcoming [Financial Planning Week](#) taking place from November 17-23 at the Old Mill. Now in its fifth year, the conference has over 300 CFPs in attendance and the goal of Financial Planning Week is to make financial planning a fundamental aspect of Canadians' lives.

STEP National Staff Give Back

In the spirit of giving back during the holiday season, the STEP National staff will be gladly volunteering on Friday, November 22 at the [Annual Gift Basket Drive](#) benefitting various women shelter's across the Greater Toronto area.