

## STEP Canada Insider

E-Newsletter Vol. 2

Issue 10 October 14, 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!

### STEP Canada WEBCAST:

**Friday, November 14, 2014: 12 noon - 1:00 pm ET**

Legislative Proposals affecting Testamentary Trusts, Graduated Rate Estates, Charitable Donations on Death and Qualified Disability Trusts. Stay tuned for registration and more details.

### Next Scheduled Branch Events

[Click here to see YOUR next regional branch event](#)



### 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

Registration for CETA Course 1: Foundations of Estate and Trust Administration is now open. Please click [here](#) to enroll. School starts on November 15, 2014!

The next Diploma exam sitting takes place

[Senior Wills, Trusts, and Estates Lawyer –  
Cox & Palmer, Halifax](#)

[Senior Trust Officer & Manager Aboriginal  
Services, Scotiabank, Barrie](#)

[Executive Director, Estate and Business  
Succession Planning – CIBC, Toronto](#)

[Senior Estates and Trusts Officer, BC Cancer  
Foundation, Vancouver](#)

on Monday, November 24, 2014. Exam locations and times will be released shortly. Tutorial notifications will be sent out this week to all students scheduled to write next month.

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## Submission to the Department of Finance

On September 26, 2014, the STEP Canada Tax Technical Committee sent a submission to the Department of Finance on the proposals relating to the elimination of graduated rates for certain trusts, modification to certain charitable donation rules and other measures that were released by the Department of Finance on August 29, 2014.

Please click [here](#) to access the PDF of visit the STEP Canada [Press Room](#) at your convenience.

## Saskatchewan Chapter Update

The Saskatchewan region has been identified for the development of a regional chapter of STEP Canada. On September 22, eight local members and three non-members attended a chapter development meeting at the offices of Stevenson Hood Thornton Beaubier LLP in Saskatoon. Janis Armstrong and Michael Dodick from the national office and George Lyall, a STEP Worldwide board member, presented the criteria for establishing a chapter and the annual objectives of a chapter. Beaty Beaubier will act as the chapter's first Chair, assisted by a strong group of executive officers: Shawn Baier, Pina Melchionna, Crystal Taylor, and Tony Banik.

## STEP Winnipeg's 15th Crystal Anniversary Celebration

STEP Winnipeg celebrated its 15th anniversary by hosting a cocktail reception at the Manitoba Club on September 23. The entire executive of STEP Canada travelled to Winnipeg for the celebrations and the day started with the first-ever STEP Canada board meeting being held in Winnipeg. After the board meeting, approximately 90 members attended the party, which was a great chance to reconnect with colleagues and celebrate the growth of the branch.



L-R Janis Armstrong, Tim Grieve, Grace Chow, John Poyser, Ruth March, Larry Frostiak, Pam Cross, Chris Ireland, Ian Worland, George Lyall, Michael Dodick

Part of the evening included an acknowledgement of the work of the many volunteers who have worked to help grow STEP Winnipeg for the past 15 years including a presentation of a **STEP Worldwide Founders' Award** to Larry Frostiak, who has been active with STEP Winnipeg, STEP Canada and STEP Worldwide since STEP first arrived in Winnipeg. The celebrations could not have happened without the generous support of all of the sponsors, including many local law, accounting and financial firms.

### **Certificate in Estate & Trust Administration**

Registration is open for the new STEP Canada Certificate in Estate and Trust Administration (CETA). A superior educational offering, CETA will be of value to both individuals who want to advance their careers and employers who want to seize the many business opportunities afforded by today's changing demographics. The first course (of the four certificate components), Foundations of Estate and Trust Administration, will open this November. Watch for our CETA ad in the October 2014 issue of [Canadian Lawyer](#).

Click [here](#) to discover more about this new program, who it was created for, and to register. For additional inquiries, please contact [education@step.ca](mailto:education@step.ca)

### **Upcoming Industry Events where you'll find STEP Exhibiting**

**October 15** - CPABC/STEP Vancouver's Joint Event [The Estate Planning Conference Day](#) at the Vancouver Convention Centre, Vancouver

**October 27-28** - Canadian Tax Foundation's [Ontario Tax Conference](#) at the International Plaza Hotel, Toronto

**November 19** - FPSC's [2014 Financial Planning Week Symposium](#) at the Arcadian Court, Toronto

November 21 – FPSC’s [2014 Financial Planning Week Symposium](#) at the Pan Pacific, Vancouver

## National Conference 2015 Dates

STEP Canada's 17th National Conference is scheduled for **Thursday and Friday, June 18–19, 2015** at the Metro Toronto Convention Centre.

### Calgary

October 15

[Executor and Trustee Risk Management](#)

### Toronto

October 15

[50 Hurdles – Business Transition Simplified](#)

### Vancouver

October 15

[Estate Planning PD Day: Joint Conference between STEP Vancouver and the CPABC](#)

### Edmonton

October 16

[Digital Assets in Estate Planning – Digitally Departed](#)

### Ottawa

October 22

[A review of Alter Ego trusts, Charitable Remainder Trust and Joint Partner trusts](#)

### Atlantic

October 23

[The Mobile Client: Multi-jurisdictional Property, Probate and Planning](#)

### London

October 23

[The use of Investment Corporations in Estate Planning for Probate and Minimization of Tax Upon Death](#)

### Winnipeg

October 23

[Predatory Marriages](#)

### Montreal

October 29

[Family Office / Multi-Family Office: What is it and Which is the Right Choice for Your Client](#)

### Okanagan

December 3, 2014

[Tax & Succession Planning Consideration for BC Farmers, Ranchers and Orchardists – Part II](#)

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