



STEP Canada Insider

E-Newsletter Vol. 3
Issue 8 August 11, 2015



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/Chapter 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!

[Personal Trust Officer – Concentra Financial, Saskatoon](#)

[Estate Planning, Notary/Lawyer – CI Financial, Montreal](#)

[Trust Associate – TD Bank, Winnipeg](#)

[Regional Trust Manager – CIBC, Edmonton](#)

[Assistant Compliance Officer and Corporate Secretary – Legacy Private Trust, Toronto](#)

Education Center

Congratulations to the 37 graduates from the Diploma and Qualified Practitioner programs this past spring. This is double the number of grads we had in spring 2014.

A reminder to all Diploma program students in the fourth course, Trust and Estate Planning, assignment #1 is due on September 2, 2015. Assignment details can be found in the [student resources area](#).

Welcome to all new CETA2 Affiliates who have recently joined. We look forward to getting you involved in the STEP Canada community!

[Learn More](#)

[Contact Education](#)

Update your contact details in the STEP Directory and Yearbook 2016 and Online Member Search

One of the many benefits derived from your STEP membership is the inclusion of your contact details in the annual STEP Directory & Yearbook which is distributed to over 20,000 members around the world. An online "Member Search" also allows members and the public to access your profile, providing you with potential business opportunities. Please watch for an upcoming email from STEP Worldwide with detailed instructions on how to enhance your membership profile.

Certificate in Estate and Trust Administration (CETA)

Registration for CETA2: Advanced Topics in Estate and Trust Administration is now open. Please click [here](#) for more details. The first CETA Course: Foundations of Estate and Trust Administration remains open for registration.

Delivery of CETA is completely online through STEP Canada's new electronic learning environment. Going paperless, social media networking, receiving instant material updates, studying on the go, and writing exams online are some of the features that give students the flexibility and mobility that they've been asking for.

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

National Conference 2016 Dates

STEP Canada's 18th National Conference is scheduled for **Thursday and Friday, June 9-10, 2016** at the Metro Toronto Convention Centre.

2015/16 Branch/Chapter Events

Toronto September 16 Fiduciary Accounting: Duties, Obligations, Process & Best Practices	Saskatchewan September 17 Recent Tax Developments Affecting Insurance Planning
Edmonton September 24 The New Estate Administration Act: How does it change your practice?	Winnipeg September 24 Tax Planning for Owner Managed Businesses in the Current Tax Environment
Atlantic October 8 Income Tax Changes Relating to Estate Planning	Vancouver September 17 TBA
Calgary	

2015-16 upcoming branch event TBA

London & Southwestern Ontario
2015-16 upcoming branch event TBA

Montreal

2015-16 upcoming branch event TBA

Okanagan

2015-16 upcoming branch event TBA

Ottawa

2015-16 upcoming branch event TBA

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