

## STEP Canada Insider

E-Newsletter Vol. 2 Issue 8 August 12, 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!

Senior Tax Manager, Calgary

Regional Vice-President Wealth Planning  
CI Investments, Calgary

Regional Vice-President Wealth Planning  
CI Investments, Toronto

Regional Vice-President Wealth Planning  
CI Investments, Vancouver

Vice President, Personal Trust Services  
Fiduciary Trust Canada, Toronto

Tax Manager - Private Companies Services  
PwC, GTA Metro North

Tax Manager - Private Companies Services  
PwC, York/Concord

#### Education Center



##### Certificate in Estate and Trust Administration (CETA)

Online registration for the CETA program will be available beginning September 1, 2014 and the doors to the first course, Foundations of Estate and Trust Administration, will open this November in the brand new eclassroom.

##### Diploma Route

The next exam sitting is scheduled for November 24, 2014. As a reminder to students enrolled in the final course, Trust and Estate Planning, the due date for your first assignment is September 15, 2014 and the assignments can be found in the Student Resources area.

##### Qualified Practitioner Route

The next essay submission is October 1, 2014.

## Joint Conference Vancouver & CPABC

STEP Vancouver and CPABC are hosting a joint conference on October 15 at the Vancouver Convention Centre. The event will be held from 8:00 am – 5:30 pm and is designed to provide up-to-date, practical, and leading-edge estate planning information.

Registration is now open. Please click [here](#) for registration and program details.

## Update your contact details in the STEP Directory and Yearbook 2015 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 19,400 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.

## Online registration opens for the Certificate in Estate and Trust Administration (CETA)

On September 1, online registration for the new STEP Canada certificate in estate and trust administration will open. 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.

STEP's self-study online CETA program consists of three courses and a final examination. Tutorial support, self-assessment quizzes, and social media networking will also be provided.

The first course, Foundations of Estate and Trust Administration, will open this November.

For more information, please contact [education@step.ca](mailto:education@step.ca)

## 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.

Atlantic

SAVE THE DATES

Upcoming 2014–15 branch events

Calgary

SAVE THE DATES

Upcoming 2014–15 branch events

Edmonton

2013–14 branch events complete

London & Southwestern Ontario

SAVE THE DATES

Upcoming 2014–15 branch events

Montreal

SAVE THE DATES

Upcoming 2014–15 branch events

Okanagan

SAVE THE DATES

Upcoming 2014–15 branch events

Ottawa

SAVE THE DATES

Upcoming 2014–15 branch events

Toronto

SAVE THE DATES

Upcoming 2014–15 branch events

Vancouver

SAVE THE DATES

Upcoming 2014–15 branch events

Winnipeg

SAVE THE DATES

Upcoming 2014–15 branch events

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