

STEP Canada Insider

E-Newsletter Vol. 3

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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!

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



Education Center

Congratulations to our top scoring students who were recognized at the annual student reception that took place during the 17th National Conference. The award winners are shown below with STEP Worldwide Vice President, Michael Cadesky and Chair, STEP Canada National Education Committee, Peter Weissman.

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

[Learn More](#)



L-R: Michael Cadesky, Robert Miedema, Katy Basi, Becky Turcotte, Justin Hoffman, Kenneth Keung, Peter Weissman.

[Contact Education](#)

17th National Conference Recap

The STEP Canada 17th National Conference took place on June 18-19 at the Metro Toronto Convention Centre. The conference was a huge success, with a record-breaking attendance of 652 registrants. Thank you to all that attended! [Click here to play highlight video](#) (please be patient as video loads).

Two overflow/satellite rooms were arranged to comfortably seat delegates for plenary sessions and both the lunches and social event were at full capacity. Apart from the full technical program, some highlights of the event included the presentation of the Michael Cadesky Volunteer of the Year award to Christine Van Cauwenberghe and the sold out social event celebration at the Distillery District Fermenting Cellar.

The conference met with much praise from attendees, with one delegate commenting "*The technical content is fantastic. There is nowhere else to get the quality of estate and trust technical content as what STEP puts on every year.*"

Next year's 18th national conference is set to take place on Thursday and Friday, June 9-10th.



17th National Conference: Opening Session

2015-16 Board of Directors and Executive Committee

At the Annual General Meeting of STEP Canada, held June 17, the 2015-16 Board of Directors and Executive Committee were elected. From the directors, the following (shown below L-R) were elected to the executive committee: Secretary, **Rachel Blumenfeld**; Deputy Chair, **Ruth March**; Chair, **Tim Grieve**; Past Chair, **Ian Worland**; Treasurer, **Chris Ireland**; and Deputy Chair, **Pamela Cross**.



The remaining board of directions include:

Director at Large, **Hélène Marquis**; Director at Large, **Christine Van Cauwenberghe**; Atlantic Branch Chair, **Andrée Godbout**; Calgary Branch Chair, **Gail Black**; Edmonton Branch Chair, **Kathryn Charr**; Montreal Branch Chair, **Pierre Kirouac**; Ottawa Branch Chair, **Michael Segal**; Toronto Branch Chair, **Brian Cohen**; Vancouver Branch Chair, **Aileen La Borie**; and Winnipeg Branch Chair, **Patricia Carver**.

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

2015/16 Branch/Chapter Events

Atlantic	Calgary
2014-15 branch events complete	2014-15 branch events complete
Edmonton	London & Southwestern Ontario
2014-15 branch events complete	2014-15 branch events complete
Montreal	Ottawa
2014-15 branch events complete	2014-15 branch events complete
Ottawa	Saskatchewan
2014-15 branch events complete	2014-15 branch events complete
Toronto	Vancouver
September 16, 2015 Fiduciary Accounting: Duties, Obligations, Process and Best Practices	2014-15 branch events complete

Winnipeg

2014-15 branch events complete

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