

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 service offers an electronic recruitment resource for the trust and estate industry. We are offering this recruitment tool to all STEP members at a discounted rate! Please visit our [Practitioner Opportunities](#) page for more information.

[Associate Lawyer – Legacy Tax + Trust Lawyers, Vancouver](#)

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

[Executive Trust Manager, Charitable Foundation Services – Scotiabank, Toronto](#)



Education Center

Dear Students,

Happy September! Welcome back from summer holidays and here's a look ahead to the fall 2015 schedule.

October 1st
Due date for QP essay submissions

October 2nd
Due date for assignment #2: Trust and Estate Planning students only
(Diploma Program, Course 4)

November 2nd
Exam sitting for **Trust and Estate Planning**

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

[Senior Analyst, Trust Administrator – National Bank, Calgary](#)

[Senior Analyst, Trust Administrator – National Bank, Vancouver](#)

[Senior Advisor and Trust Officer – National Bank, Ottawa](#)

[Trust Administrator – Legacy Private Trust, Toronto](#)

[Learn More](#)

students only

November 23rd

Exams sittings (paper-based, report to exam centre):

- Law of Trusts
- Taxation of Trusts and Estates
- Wills, Trust and Estate Administration

Exams online (exams proctored and written online):

- CETA1 - Foundations
- CETA2 - Advanced Topics

Further information regarding tutorial sessions; DP exam locations; and CETA exam sign in will be circulated to students 4-6 weeks in advance of their respective exam date.

[Contact Education](#)

Regional Branch Programs 2015-16

STEP continues to deliver critical and relevant information essential to the trust and estate practice. Our regional and chapter branch committees have been working hard to put together an impressive program line-up for the 2015-16 season. Registration is now open for all Value Passports and September events. Please [click here](#) for the latest program information and listings.

Certificate in Estate and Trust Administration (CETA)

STEP's self-study online CETA program is of value to individuals who want to start or advance their career and to employers who want to seize the many business opportunities resulting from today's changing demographics. Organizations staffed by knowledgeable estate administrators and trust officers who can skillfully manage this changing market will attract new clients and business prospects. [Click here](#) to learn more about this educational offering.

The exam sitting for CETA1 and CETA2 is scheduled for **November 23, 2015**. Prepare yourself for examination day by taking advantage of our online CETA tutorial support, self-assessment quizzes, and social media networking. The spring exam sitting will take place on May 30, 2016.

To register for CETA1 (Foundations of Estate and Trust Administration) and CETA2 (Advanced Topics in Estate and Trust Administration) courses, please visit the STEP Canada website, or [click here](#) for more information. For further inquiries, please contact education@step.ca

STEP Worldwide Council Election Results

STEP Canada is pleased to announce the re-appointment of Nancy Golding of Borden Ladner Gervais in Calgary, AB to the STEP Worldwide Council. The call for nominations ended on Monday, August 17th, 2015 at 11:59 pm Pacific Time.

Nancy was originally elected to Worldwide Council in 2013 for a 2-year term; this new 3-year term will end in 2018. Nancy will continue her service concentrating on special projects, special interest groups (SIGs) and an initiative for Council on engaging new members.

Congratulations Nancy and thank you for your continued dedication.

CPD Audit

STEP Worldwide will be contacting a random selection of members for a CPD audit beginning this month.

Of Interest to Members

The Continuing Legal Education Society of British Columbia (CLEBC) and the Canadian Centre for Elder Law (CCEL) in collaboration, present the 2015 Canadian Elder Law Conference, The Journey of Aging – the Law and Beyond. This 2 day conference will take place on Thursday, November 12 and Friday, November 13, 2015 in Vancouver. [Click here](#) for more information.

National Conference 2016 Dates

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

2015/16 Branch/Chapter Events

Toronto

September 16
[Fiduciary Accounting: Duties, Obligations, Process & Best Practices](#)

Ottawa

September 16
[Dealing with Incapacity Issues and Preventing Financial Abuse](#)

Montreal

September 17
[Discretion in Trusts](#)

Saskatchewan

September 17
[Recent Tax Developments Affecting Insurance Planning](#)

Vancouver

September 17
[In-bound Immigration Planning – Now that the Immigration Trust is Dead, What do you do?](#)

Calgary

September 22
[Private Company Business Planning / Structuring Part 1](#)

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](#)

Okanagan

October 7
[Taxation of Alter Ego and Joint Partner Trusts](#)

Atlantic

October 8
[Income Tax Changes Relating to Estate Planning](#)

London & Southwestern Ontario

October 14

[Powers of Attorney](#)

(Live event in Toronto, broadcast location available in London)

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