

STEP Canada Insider

E-Newsletter Vol. 2 Issue 9 September 9, 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 Estates and Trusts Officer, BC Cancer Foundation, Vancouver

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

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 has opened on September 1. Please click [here](#) to register and to learn more about this new program. 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.

Qualified Practitioner Route

The next essay is due on October 1, 2014

Regional Branch Programs 2014–15

The regional branch committees have been working hard to pull together the program line-up for the 2014–15 season. Registration is now open for all September events. STEP continues to provide critical and relevant topics that are required for your ongoing trust and estate practice. Please click [here](#) to view and register for your upcoming event.

Online registration has opened for the Certificate in Estate and Trust Administration (CETA)

Registrations have been coming in for the new STEP Canada Certificate in Estate and Trust Administration which opened up on September 1. 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 online course, Foundations of Estate and Trust Administration, will open this November.

Please click [here](#) to register and learn more about this new program. For additional inquiries, please contact education@step.ca

STEP Worldwide Council Election Results

Recently STEP Canada ran its election for the two available terms on the STEP Worldwide Council. Kathleen Cunningham was elected to the three year term and John Poyser was re-elected to the two year term; they will serve with Nancy Golding as our three Canadian representatives.

CPD Audit

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

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.

Ottawa

September 10
Relationship between Powers
of Appointment and Discretionary
Trusts

Toronto

September 10
2014 Budget – Estate Planning and
Charitable Gifting

Calgary

September 17
Can a Child's Inheritance be Protected?

Vancouver

September 18
US–Canada Cross Border Planning
Update: Practical Advice On What You
Need to Know Now

Montreal

September 23

We've got to talk about...

Winnipeg

September 23

STEP Winnipeg's 15th(Crystal)
Anniversary and Founders Award
Presentation to Larry Frostiak

Edmonton

September 25

Advance Care Planning for Elders:
Before the Aftermath

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

Okanagan

November

21-Year Planning

Contact Us | Phone: 416-491-4949 ext.221 | www.step.ca