STEP CANADA
Supporting trust and estate practitioners in their pursuit of excellence

insider

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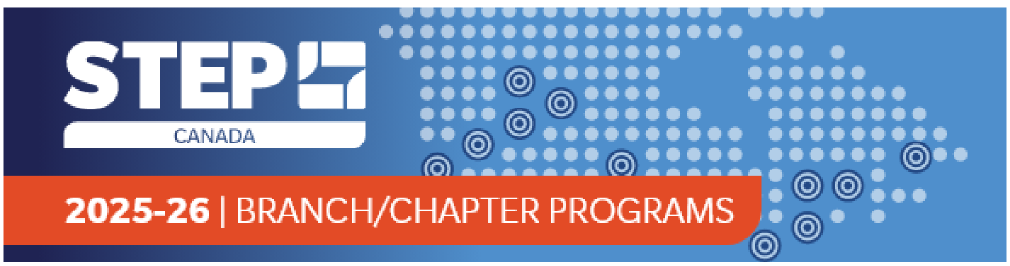
*With access to the monthly **STEP Insider**, readers receive the latest news about STEP Canada, branch and chapter activity, national event updates, recent practitioner opportunities, education information, and more!*

STEP Canada Website
STEP Member Directory
STEP Worldwide Website
Practitioner Opportunities

Sneak Peek: 2025-26 Program Season



Get Ready for an Exciting 2025-26 Program Season!

Your Branch/Chapter Board is excited to share a sneak peek of what's ahead for the upcoming event season. From can't miss networking opportunities to valuable CPD, we've got an incredible lineup in store and we can't wait to welcome you!

Be sure to check out what's coming your way by selecting your branch or chapter after clicking on the link below.

Behind the scenes, our team is working hard to finalize all the details. Registration will open shortly!

2025-26 Seminars & Events

27th National Conference CPD/CE Credits

For online delegates, or those who wish to rewatch or watch any concurrent sessions they missed, all sessions have been archived and are available for on-demand viewing until December 31, 2025. Delegates can find all sessions available through the 27th National Conference App. The maximum CPD available is **22.50 hours** for all 19 sessions.

Please note that accreditation for substantive CPD is currently pending with regulating bodies where applications are required, and CPD/CE certificates are scheduled to be sent to delegates in mid-August. Click below for more CPD information.

***Note**: Participation at the STEP Canada National Conference in-person or online is designed to meet your ongoing STEP CPD requirements.*

CPD/CE Accreditation Information

STEP's 20th Annual Private Client Awards

STEP's Private Client Awards ceremony will take place on September 18th, 2025 at the London Hilton on Park Lane in London, UK, to celebrate the hallmark of quality within the private client industry.

Best of luck to the Canadian finalists:

Boutique Firm of the Year (legal)
Whaley Estate Litigation (WEL) Partners

Boutique Firm of the Year (non-legal)
Our Family Office Inc.

Employer of the Year
NIKA LAW LLP

Multi-Family Office Team of the Year
First Affiliated Holdings Inc.
Our Family Office Inc.
TD Wealth Family Office

Philanthropy Team of the Year
Our Family Office Inc.

Learn More

Coming Soon: New Marketing Brochures for Clients

STEP Canada's five marketing brochures, *"Why Choose a Professional With a TEP Designation?", "Why Make an Enduring Power of Attorney?", "Why Make a Trust?", "Why Make a Will?", and "Why the 'Four C's' of Elder Law are Important to You",* have been refreshed!

These brochures, prepared by STEP Canada to assist you in promoting your specialized knowledge and services to your clients, have been updated to reflect current statistics, trends, language, and branding.

Members of STEP Canada can purchase these brochures at cost from the National Office. Summaries and pricing will be available shortly.

Stay tuned for more information.

Accessing Remaining 2024-25 On-Demand Seminars

Are you looking for regionally focused in-depth technical content or ways to meet your CPD requirements? The 2024-25 program season has now wrapped up, but most branches and chapters have online on-demand seminars that will remain available until December 31st!

To learn more, click the link below and select your local branch or chapter.

View the 2024-25 Online On-Demand Options

Practitioner Opportunities

Advertising with STEP Canada's Practitioner Opportunities service offers a highly cost-effective, quick, and simple way to attract the right candidates in this industry. STEP Canada is proud to offer a Practitioner Opportunity service as a great resource for connecting the highest caliber of trust and estate practitioners to employers.

Trust Manager - Legacy Private Trust (Toronto, ON)

Have questions?

More on Practitioner Opportunities
or
Post an Opportunity

Education Centre

Education Program	Exam/Essay Date	Registration Deadline
CETA 1	Accessible at any time	Exams must be completed within 6 months of registering
CETA 2-4	September 3, 2025 *CETA exams will be on-demand starting January 2026*	CLOSED
STEP Canada Diploma Program *All Courses*	November 3, 2025	September 1, 2025
Essay Submission	October 1, 2025	2025 topics can be found here

Updates

CETA - Certificate in Estate & Trust Administration

We are pleased to announce that as of January 2026 all CETA exams will be delivered via an online on-demand format.

- **No set exam dates** - Take your exam anytime, day or night, when you are ready (within 12 months of registration)
- **Convenient access** - The exam link will be located in your online learning platform, and all you will need to do is click the link to start
- **Self-paced learning -** Progress through the course and program at a speed that's comfortable for you, with the flexibility to manage your own study schedule

Diploma Program

Reminder: The deadline to register for the November exam is on September 1st.

The tutorial session registration links and the Instructor Q&A Board dates are all posted in your classroom.

NEW Certificate Program Coming Soon

Investment Basics for Fiduciaries

This program covers essential investment knowledge for administering estates, trusts, and managing the financial affairs of incapable persons. Pre-registration opening soon!

By connecting investment fundamentals to real-world fiduciary decision-making, this course empowers professionals to navigate their responsibilities with confidence and compliance.

- **Fiduciary Roles & Responsibilities -** Master the key duties of executors, trustees, and decision-makers for incapable clients
- **Investment Fundamentals -** Develop a foundation in investment principles tailored to fiduciary management
- **Legal & Tax Considerations -** Understand the legal and tax framework that guides fiduciary investment decisions
- **Real-World Case Studies -** Apply your knowledge to practical fiduciary scenarios for informed, responsible decision-making

Connect with our Education Team at education@step.ca if you are interested in learning more.

Login to MY STEP

Connect With Us on LinkedIn

Join our online community and stay connected to your fellow practitioners and STEP Canada staff. We encourage all our members to be active and contribute through our corporate and individual branch/chapter groups. Our goal is to provide a forum for our members to explore their shared experience as trust and estate practitioners.

You can find the link to your local branch/chapter group on the STEP Canada corporate page.

Need help? View the LinkedIn Cheat Sheet.

Follow STEP Canada's LinkedIn Page

Searchable Resource Tool (SRT)

Reminder: As a benefit of STEP membership, you can easily search and access content from our library, including a collection of PDF versions of presentation decks, formal papers, additional resources, and articles from Branch/Chapter seminars, National Conferences, and Webcasts, as well as articles from STEP Inside.

Since it's launch in March 2022 there have been more than 13,000 individual searches, with some of the most popular search terms being "digital assets", "cross-border", "insurance", "spousal trust", "estate freeze", and "wills".

The SRT has continued to grow with over 10 years' worth of content, including recent events such as the 2024-25 Branch Bundle seminars.

Members can access the SRT by logging into their MY STEP account.

Login to MY STEP

Reminders

STEP Canada staff work remotely and members are encouraged to communicate with us using email. Not sure who to write to? Send any inquiry to **memberservices@step.ca** and our team will forward your message to the right staff member.

We would like to extend a **big thank you** for our students, TEPs, and supporting employers who see the enormous value in STEP education and membership.

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