



E-Newsletter Vol. 13 | Issue 6 | June 10, 2025

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](#)

[Advising Families Canada](#)

[Practitioner Opportunities](#)

Thank You for Renewing Your STEP Membership!

Over 90% of STEP Canada members have completed their annual membership renewal - thank you!

Renewing your STEP Canada membership will allow your continued use of the TEP designation (if applicable) and grant multiple membership benefits such as discounts on programs/seminars, access to member-only publications and resources, representation from STEP, access to the Searchable Resource Tool (SRT) and much more.

If you haven't renewed your membership yet, please join them by logging to your MY STEP account to complete it. Membership renewals were due by **April 1, 2025**.

If you have any questions or concerns regarding your membership renewal, please reach out to our Member Services team by emailing memberservices@step.ca.

[Login to MY STEP](#)

27th National Conference

Watch the Program on Your Schedule!

We are proud to announce that registration has exceeded our expectations, and in-person attendance for the conference is now sold out. But don't fret - you can still be part of the action!

While our in-person conference will be taking place in just a few weeks, you can set your own viewing schedule by registering for online on-demand viewing! Enjoy the experience and gain access to this year's outstanding content at your convenience. It's the perfect opportunity to take in expert insights, earn valuable CPD credits, and engage with our dynamic program – all on your time, from the comfort of your home or office, starting Monday, June 23 (**please note that there is no access to online viewing during the days of the in-person conference**).

All delegates are eligible to receive up to 22.50 hours of CPD.

[Details & Registration](#)

Thank You to Our Generous Sponsors

STEP Canada is grateful to have secured a tremendous level of support from several industry sponsors. Their continued support allows us to make your conference experience the best it can be! Click the link below to learn more about these generous organizations.

[Learn More About Our Sponsors](#)

STEP Canada's Annual General Meeting

The 2025 STEP Canada Annual General Meeting (AGM) is scheduled for Thursday, June 12th, 2025 at 1:00pm ET, and will be moderated and administered by GetQuorum, a trusted third-party solution.

Full Members in good standing will have received electronic communications, including materials and voting instructions, from notices@getquorum.com (please ensure you check your junk/spam folders if you haven't received anything).

Sneak Peak: 2025-26 Program Season Flyers

All of STEP Canada's 11 branches and chapters are proud to share preliminary program information for the 2025-26 season. To see what events are being organized in your region, click the link below for your local branch or chapter.

[STEP Atlantic](#)

[STEP Calgary](#)

[STEP Edmonton](#)

[STEP Montreal](#)

[STEP Okanagan](#)

[STEP Ottawa](#)

[STEP Saskatchewan](#)

[STEP Southwestern Ontario](#)

[STEP Toronto](#)

[STEP Vancouver](#)

[STEP Winnipeg](#)

STEP's 20th Annual Private Client Awards

The prestigious STEP Private Client Awards celebrate their 20th anniversary in 2025! Entries are now closed, with over 300 submissions received, and the finalists will be announced on Friday, June 20th. Winners will be announced at the Awards Ceremony in London, UK on September 18, 2025.

"Being recognised on a global scale with such a prestigious award gives us tangible proof for our commitment to excellence."

- **Patricia Saputo**, TEP, Crysalia - Montreal, QC
Winner of Family Business Advisory Practice of the Year 2024

[Learn More](#)

STEP Inside

Jump into the special May edition of STEP Inside!

Members can find their digital copy available after logging into their MY STEP account at www.step.ca, or by clicking the button below.

We would like to express a heartfelt appreciation to members of the editorial board, technical reviewers, and contributing authors in this issue, for sharing their valuable expertise with STEP members across the country.

We would also like to applaud all 2024 STEP Canada graduates and celebrate the individuals who achieved academic excellence in their courses and programs. Congratulations!

As always, the editorial committee welcomes article proposals from all members for future editions at news@step.ca.

Don't forget, as a benefit of membership, you are entitled to receive a hard copy of this valuable resource.

[Read the May Edition](#)

Contribute to STEP Inside

Attention Readers!
Are you interested in contributing to STEP Inside?

As an Author:

Each issue contains 2-3 lead articles and 7 regional "In the Headlines" pieces. The lead articles are 2500-3000 words; the regional headline pieces are 700-800. All content is subject to professional editing and technical review. Send your article proposal to news@step.ca for editorial committee consideration.

As an Editorial Committee Member:

The committee meets 3x annually to discuss story line-ups for forthcoming issues. Committee members take turns authoring the lead editorial that ties the issue content together, performing technical content reviews, and are occasionally authors. Email news@step.ca to express your interest in joining the editorial committee (2-3 opportunities annually).

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.

Have questions?

[More on Practitioner Opportunities](#)

or

[Post an Opportunity](#)

2024-25 Program Season

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 Program Offerings](#)

Members can also view the Event Calendar to see all upcoming events.

[View the Event Calendar](#)

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	August 3, 2025
STEP Canada Diploma Program All Courses	November 3, 2025	September 1, 2025
Essay Submission	October 1, 2025	2025 topics can be found here

Updates

EXAM GRADE RELEASE

Diploma program (May 26th exam) grades will be released on **June 26th**, and CETA 2-4 (June 3rd exam) grades will be released on **June 30th**. An email will be sent to students notifying when the grades are available on your MY STEP account, under "My Courses & Marks". Should you wish to register for your next course prior to receiving your course grade, you may do a provisional registration. The provisional registration form can be found in your course platform.

For Diploma and CETA students who have successfully completed their program, congratulations on this achievement! Certificates will be mailed out in late summer. Please ensure your preferred mailing address is updated in your MY STEP account no later than June 30th.

[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 its 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 National Conference and the Canada-US Cross-Border Conference.

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.

Click to [edit Email Preferences](#) or [Unsubscribe](#) from this list.

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