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STEP Canada Tax Technical Committee

On November 5th, 2013 the STEP Canada Tax Technical Committee sent a submission to The Honourable James M. Flaherty, P.C., M.P., Minister of Finance, Tax Policy Branch, Department of Finance on the Legislative Proposals to Modernize the Life Insurance Policy Exemption Test that were released by the Department of Finance on August 23, 2013.

A few members of the STEP Canada Tax Technical Committee and others participated in discussions concerning the submission and contributed to its preparation, in particular:

Pamela Cross (Borden Ladner Gervais LLP)

Paule Gauthier (RBC Wealth Management Services)

Robin Goodman (RBC Wealth Management Financial Services)

Chris Ireland (PPI Advisory)

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STEP Canada strives to work closely with the Department of Finance to maintain our cooperative relationship that benefits our valued members.

About STEP Canada:

The Society of Trust and Estate Practitioners is the leading international organization for trust and estates professionals. Headquartered in London, England, it has more than 16,500 members worldwide in 66 countries.

STEP Canada, founded in 1998, has almost 2,000 members with branches in the following cities and regions: Atlantic, Montreal, Ottawa, Toronto, Winnipeg, Calgary, Edmonton, Vancouver and a Chapter in London & Southwestern Ontario. STEP is a multi-disciplinary organization with the most experienced and senior practitioners in the field, including: lawyers, accountants, financial planners, insurance advisors and trust professionals. They provide domestic and international advice on trust and estates, including planning, administration and related taxes.

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