



STEP Diploma for Canada Course Comparison Form for the Following STEP Canada Course:

Wills, Trust & Estate Administration

If you are requesting an exemption for the completion of a law school course or for the completion of a course or the attainment of a credential not currently recognized by STEP Canada, you must complete and submit this **form together with your Exemption Application**.

You must satisfy STEP that there is a very close correlation in both the previously completed course or obtained credential and STEP's Wills, Trust & Estate Administration Diploma course. Please include as much detail as possible.

Name of Applicant: _____

Date of Exemption Application: DD/MM/YYYY

1. Course/Qualification Details

Name of Course/Credential earned: _____

Awarding body: _____

Date completed: MM/YYYY

Teaching hours: _____

Evaluation format (e.g. online exam, closed book proctored exam, etc.): _____

Post-qualification experience (set out your work experience in the field including timeframes): _____

2. Comparison to STEP Course

STEP Canada Course Name:
Wills, Trust & Estate Administration

Name of Course/Credential:

Summary of Topics Covered (If you require further details, see the detailed description for the course in the Diploma section of the STEP website.):

Summary of Topics Covered (Transcribe below the information from a verified course/credential description to match, to the extent possible, the corresponding STEP topics):

1. Powers of Attorney for Property

2. Personal Directives and Living Wills

3. The Law of Wills



STEP Diploma for Canada (Trust & Estates) Course Comparison Form
for the Following STEP Canada Course:
Wills, Trust & Estate Administration

2. Comparison to STEP Course Cont'd	
4. Will Preparation	
5. Intestate Estates	
6. Claims against Estate by Family Members	
7. Quebec Issues for Canadians Outside Quebec	
8. Obtaining the Grant of Probate	
9. Probate Fee Planning	
10. Administration of Trusts & Estates	
11. Steps in Estate Administration	
12. Administration of Trusts and Property held for others under Statutory Authority	
13. Estate and Trust Accounts	
14. Foreign Property and Wills	

