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

Trust & Estate Planning

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.**

<u>You must satisfy STEP that there is a very close correlation in both the previously completed course or obtained credential and STEP's *Trust & Estate Planning* Diploma course</u>. <u>Please include as much detail as possible.</u>

***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): ______________________

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2. Comparison to STEP Course

STEP Canada Course Name: **Trust & Estate Planning**	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. The Estate Planning Process	
2. Uses of Trusts for Non Tax Reasons	
3. Uses of Trusts for Tax Planning	

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

2. Comparison to STEP Course Cont'd	
4. Planning for Particular Family Situations	
5. Planning for the Business Owner	
6. Use of Insurance in Estate Planning	
7. Post Mortem Tax Planning	
8. Designing the Estate Planning to Fit the Client – Avoiding Pitfalls	
9. Advanced Tax Issues and Traps for Trusts and Estates	
10. Charitable Giving	
11. U.S. Estate Tax Planning	
12. Offshore Basics	

Any further information you would like to include regarding the course/credential you are submitting as comparable (attach schedule if necessary): ____

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2. Comparison to STEP Course Cont'd
Additional Information Continued:____

3. Confirmation
I confirm that the details given in Section 1 & 2 are correct. Signed: ______________________________________ Date: ____________________