



STEP Diploma for Canada Exemption Application Form

Please ensure you complete all areas and include the following:

- An **official transcript or letter of good standing** for the course taken or credential obtained
- A completed **Course Comparison form + verified course/credential description** as required below.
- Payment
- All necessary signatures, dated

On completion of this form please send by mail to:

STEP Canada
Attention: Member Services
1 Richmond Street West, Suite 700
Toronto, Ontario M5H 3W4

1. Personal Details

First Name: _____
 Family Name: _____
 Address: _____

 City: _____ Province: _____
 Postal Code: _____
 Tel Number: _____
 Mobile Number: _____
 E-mail: _____

2. Exemption Details Cont'd

Indicate the awarding body of the credential/course and the date on which it was awarded (date must be within the last five years): _____

 (Also, please provide an official transcript or letter of good standing verifying this information)

2. Exemption Details

Use this form for only one request; complete a second form if requesting a second exemption

Select the course (taken within the last five years) for which you are requesting an exemption and the credential or course on which your request is based

- Law of Trusts
 - Law school course in Trusts*
 - Member, Trust Institute (MTI) – Estate and Trust Management
- Taxation of Trusts & Estates
 - CICA In-depth Tax Course (Parts I & II) plus an advanced level CICA course in the area of trusts or estate planning
 - Law school course in Taxation of Trusts and Estates (including LLM) or
 - MTax, providing a course on Taxation of Trusts and Estates was completed*
- Wills, Trust & Estate Administration
 - MTI in Estate and Trust Management
- Trust & Estate Planning
 - Advocis/The Institute: Advanced Estate Planning
- Other*, please specify the course or credential you consider to be broadly equivalent: _____

*Complete the Course Comparison form available at www.step.ca and submit it with this exemption application form

3. Confirmation

I confirm that the details given in Section 2 are correct.

Signed: _____
 Date: _____

4. Payment of Fees

The non-refundable fee for each exemption requested is \$150.00 (+ applicable taxes)

Please choose a payment method:

- I enclose a cheque made payable to STEP Canada
- I authorize you to debit my Visa/MasterCard

Name on card: _____
 Credit card number: _____
 Card expiry date: MM/YYYY ____/____
 Payment: **\$150.00 (+ applicable taxes)**

Signature of cardholder: _____
 Date: DD/MM/YYYY _____

Payment of your exemption fee will be processed on approval of your application. All fees are set by STEP Canada and are subject to change without notice.