



STEP Diploma for Canada Exemption Application Form

Please ensure you complete all areas and include the following: On completion of this form please send by mail to:

- 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

STEP Canada
Attention: Education
45 Sheppard Avenue East, Suite 510
Toronto, Ontario M2N 5W9

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*
 - MTI designation from CSI (obtained prior to January 1, 2017)
- 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 designation from CSI (obtained prior to January 1, 2017)
 - STEP Canada CETA certificate holder
- Trust & Estate Planning
 - Advocis/The Institute: CLU #237 (Advanced Estate Planning)
 - CFP designation from FPSC
 - Pl. Fin. from IQPF

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 / AMEX

Name on card: _____

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.