



## 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 or email to:**

**STEP Canada**  
Attention: Member Services  
1 Richmond Street West, Suite 700  
Toronto, Ontario M5H 3W4  
memberservices@step.ca

### 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

Select the course (taken within the last 5 years) for which you are requesting an exemption and the credential or course on which your request is based (*Use this form for only one request; complete a second form if requesting a second exemption*):

- Law of Trusts
  - Law school course in Trusts\*
- Taxation of Trusts & Estates
  - CICA In-depth Tax Course (Parts I & II)
  - Taxation of Trust and Estates CSI Course (523 or 533)
  - Law school course in Taxation of Trusts and Estates\*
- Wills, Trust & Estate Administration
  - Law school course in Wills & Probate\*

**OR**

- Law school course in Law of Succession\*
- MTI designation in Estate and Trust Management
- CSI (previously ICB) Estate and Trust Administration Level 1 (522) and Level 2 (531)
- Trust & Estate Planning
  - CFP/IQPF
  - CLU
  - Law school course in 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](http://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 (plus 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: \_\_\_\_\_

Signature of cardholder: \_\_\_\_\_  
 Date: DD/MM/YYYY \_\_\_\_\_

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