



STEP 

Canada


ADVISING FAMILIES ACROSS GENERATIONS

Discover

A WORLD OF BENEFITS
WITH STEP CANADA



www.step.ca



Becoming a member of the Society of Trust and Estate Practitioners (STEP) signifies acceptance in the world's leading organization for trust and estate professionals. Founded in 1991 and based in London, England, STEP Worldwide has more than 20,000 members in 95 countries.

STEP Canada, founded in 1998, has over 2,400 members with branches in Vancouver, Calgary, Edmonton, Winnipeg, Toronto, Ottawa, Montreal, the Atlantic region; and chapters in London & Southwestern Ontario, the Okanagan Valley, and Saskatchewan.

STEP is a multidisciplinary organization made up of the most experienced and senior practitioners in the field of trusts and estates, including lawyers, accountants, financial planners, insurance advisors and trust professionals. Members provide domestic and international advice on trusts and estates, including planning, administration and related tax issues.

They provide advice for an individual following their partner's death; ensuring elderly and vulnerable relatives are cared for; ensuring that a family business passes safely from one generation to another, and helping clients to support charitable causes in an effective way. STEP Canada provides its members with a high level of education, training, representation and networking.

TEP Designation

The Pinnacle of Professional Expertise



Full members of STEP hold the Trust and Estate Practitioner (TEP) designation, an internationally recognized hallmark of professional expertise in the area of trusts and estates. TEPs are the most senior practitioners in the field and are recognized as the experts to whom others turn for in-depth advice. The TEP designation signifies to your clients that you have specialized knowledge and education in the area of trust and estate planning.

Over the next two decades, 3.6 million Canadians are expected to leave a financial legacy, assigning an estimated \$1 trillion to their families and communities. A TEP designation positions you to provide advice during an unprecedented transfer of wealth from one generation to the next.

Increased competition in the field of trust and estates means it's more important than ever to differentiate yourself as an expert. A TEP designation stands out.

Education & Routes to M

PROGRAM / R O

Certificate in Estate and Trust Administration (CETA)

Comprehensive industry preferred standard of foundations delivering practical career development

Diploma Program (DP)

In-depth academic and professional expertise for aspiring or committed industry practitioners



REQUIREMENTS

Qualifying Designation
Not Required
Industry Experience
Not Required

Qualifying Designation
Recommended
Industry Experience
Not Required



COMPONENTS

Three proctor examined, self-study courses;
plus one final exam

Four proctor examined, self-study courses



MAXIMUM ALLOWED TIME

4 years

4 years

Minimum Passing Grade: 60%

Minimum Passing Grade: 60%



NEXT

Proceed to DP Program

+ 2 years proven practice experience?
If yes, apply for TEP designation

Membership - How to join

U T E C H O I C E S

Qualified Practitioner Program (QP)

Candidates prove established, post-designation, in-depth practice experience and knowledge



Experienced Practitioner (EP)

A peer refereed and scrutinized application process reserved for the most senior and experienced industry specialists



E M E N T S

Qualifying Designation Required

Industry Experience
+3 years

Qualifying Designation Required

Industry Experience
+10 years



A N D E L E M E N T S

Three scholarly essays of journal publication quality reflecting serious consideration and in-depth understanding of selected topics

Application, education, and practice experience examined and measured against relevant sections of Diploma Program



I M E T O C O M P L E T I O N

3 years

Minimum Passing Grade: 60%

Applications can take up to 6 months for assessment by local, national; and subsequently, worldwide committees

Minimum Passing Grade: n/a



S T E P S

Apply for TEP designation

Apply for TEP designation

Education & Routes to Membership Facts

STEP membership is based on education and experience. There are different levels of membership designed to match the progression of your career, culminating in full membership and the TEP designation.

STEP Canada Certificate in Estate and Trust Administration (CETA)

This innovative educational offering is designed to enhance the knowledge and performance of Canadian estate administrators, trust officers, junior trust officers, retail bankers, law clerks, junior associates, paralegals, wealth management sales representatives and administrative assistants working in the area of estates and trusts.

The online CETA program is available in English and consists of three courses and a final examination. French language product is forthcoming.

CETA 1: Foundations of Estate and Trust Administration

CETA 2: Advanced Topics in Estate and Trust Administration

CETA 3: Estate and Trust Taxation

CETA 4: Certificate Examination

STEP Canada Diploma Program

The STEP Canada Diploma program is the best choice for practitioners who want to establish themselves as specialists in the trust and estate industry.

Students with prior trust and estate experience tend to be the most successful. An examination completes each of the four self-study courses that make up the STEP Diploma:

DP 1: Law of Trusts

DP 2: Wills, Trust & Estate Administration

DP 3: Taxation of Trusts and Estates

DP 4: Trust & Estate Planning



Qualified Practitioner Program

Practitioners with a recognized professional designation who have a minimum of three years' current, post-qualification experience in the area of trusts and estates will find this program the most rewarding.

Practitioners accepted into the qualified practitioner route are required to complete three master level essays within four years of enrollment. Essay topics are selected from a list of pre-approved subjects which change regularly. These can be found on step.ca.

Experienced Practitioner Route

This route to membership is reserved for the most senior trust and estate practitioners. Candidates should have a minimum of 10 years of appropriate and relevant experience in the area of trusts and/or estates and a recognized professional designation. The experience of all potential candidates will be examined and measured against the relevant sections of the STEP Canada Diploma Program curriculum.

Please contact your local branch or chapter executives, or the STEP Canada national office for more information.

For full details regarding
STEP Canada's Routes to Membership,
please visit www.step.ca/joining

Member Benefits

The prestigious TEP designation signifies to both clients and potential employers that you have an advanced understanding of trust and estates, and that you are proactive in staying abreast of the latest developments in the field.

Some of the most significant benefits of membership include:

Use of the TEP Designation and STEP logo

Full members of STEP are entitled to use the internationally-recognized TEP designation and the STEP logo. Both will give clients confidence and peace of mind knowing that you have met the rigorous standards the designation requires.

STEP Programs, Events & Continuing Professional Development

STEP organizes high-quality, industry-specific technical conferences and programs. These events offer continuing professional development credits, helping to keep members abreast of developments in trust and estate regulations and practice. Held at international, national, and regional levels, these events are major forums for industry discussion, presented by senior practitioners and academics.

STEP Canada actively pursues continuing professional development accreditation from applicable professional bodies.

Networking Opportunities

As the largest trust and estate society in the world, STEP offers unparalleled opportunities for networking and business development. One of STEP's greatest assets is its branch and chapter system. Regular events organized at the regional level reflect the variety and depth of our members' expertise in the areas of law, accounting, wealth management, insurance and trust administration. At no other gatherings will you find so many senior practitioners from such a wide range of professions.

National Conference

Held each June, the National Conference is Canada's premiere event for trust and estate practitioners. Panels of multidisciplinary expert practitioners address topics and issues critical to your practice. The two-day conference is a can't-miss event, representing the largest gathering of its kind both domestically and internationally.



Preferential Pricing

STEP members receive preferential pricing for all STEP programs and events.

Webcasts

Members can view STEP webcasts that focus on Canadian, industry-specific topics using the step.ca website. While our annual budget webcast is complimentary, our pay per view webcasting system allows members to attend both live and archived webcasts.

STEP Website Features

step.ca offers members the opportunity to explore and register for upcoming branch and chapter seminars and programs, view government submissions, remit annual membership dues, update profile information, order marketing brochures, view webcasts, monitor the job board and much more. The site includes a press room, resource centre, and student section. STEP Canada is actively looking at innovative ways to bring new features to our members.

Advocacy & Representation

STEP Canada is a strong advocate and represents the interests of the public to regulators, government departments and national organizations. It also monitors Canadian legislation and, where needed, advocates for legislative change and policy reform through the activities of its Public Policy Committee, its Tax Technical Committee, and its Trust and Estate Technical Committee.

Exclusive Members Discounts

Becoming a STEP member entitles you to exclusive member-only discounts of up to 40% on STEP events and programs. Members are also eligible to purchase Program Passports, which offer savings on the purchase of a series of events (availability varies by branch and chapter). In addition, members enjoy discounts on STEP publications and webcasts.

STEP Canada Job Search: Practitioner Opportunities

Accessible from step.ca, the STEP Canada job board is frequented by both hiring organizations and trust and estate practitioners. Do you have a job vacancy to advertise? STEP Canada members receive discounted rates on all job vacancy advertisements.

Technical Resources

The technical resources section of the STEP website includes information about legislation, tax treaties, forms, articles, books, bibliographies and periodicals - everything you need to stay current!

STEP Publications

STEP Inside

All STEP Canada members receive the STEP Inside magazine three times a year. This publication contains industry news and articles, case studies, as well as regulatory and taxation updates.

STEP Insider

This monthly electronic publication keeps members up-to-date with technical eNews bulletins, information about branch activities, national conference updates, practitioner opportunities, education updates and more.

STEP Journal

Published ten times annually, the STEP Worldwide flagship magazine contains industry news, jurisdictional reviews, opinion, and technical analysis of trends and issues facing trust and estate practitioners internationally. The Journal also includes recruitment opportunities and an events calendar.

Directory & Yearbook

This printed directory is published and distributed to all members on an annual basis. It contains over 800 pages of jurisdictional information and the contact details for every STEP member in the world.

Access to and inclusion in the STEP Online Member Directory

Members receive a personalized listing and can search for other STEP members by using the searchable online directory, available through the step.org website.

Member Search

“Member Search” is a feature of the STEP Worldwide website that allows the general public to search for a practitioner by region and specialization. Members who have maximized the robust profile options of the online directory increase their presence within the industry and to the greater public.

STEP Marketing Brochures

STEP marketing brochures serve as handy reference guides for members of the public. Providing essential information to their clients, STEP members can purchase these brochures at cost for display and distribution. Marketing brochures include:

- *Why Make a Trust?*
- *Why Make a Lasting Power of Attorney?*
- *Why Make a Will?*
- *Why Use a TEP?*

To order brochures, please visit www.step.ca or email memberservices@step.ca

Testimonials

96% of all members would recommend STEP to a colleague

92% of members believe that being a STEP member has benefited their career

“ I am proud to have been associated since its inception with the Calgary branch of STEP. I have also been involved at the national level of STEP Canada for years. Membership in STEP, for me personally, has proved to be invaluable over the years given the tremendous worldwide membership that STEP has and the depth of knowledge of such members. For us here at Moodys Gartner, membership in STEP is like putting a hand in a glove...it's a natural fit. ”

*Kim G.C. Moody, FCA, TEP
Founder of Moodys Gartner LLP Tax Advisors
Member, STEP Calgary Branch | Past Chair, STEP Canada*

“ STEP has provided me with tremendous learning opportunities and a network of informed colleagues. Having been involved in branch administration, national STEP committees, and various lobbying efforts, I can attest to the dedication of volunteers and staff and the high quality of STEP events. STEP's annual national conference, for example, is the best estate-planning conference in the country. I encourage everyone in the trusts and estates field to get involved. ”

*Alison Oxtoby, LLB, TEP
Partner, Entrust Law Group LLP
Member, STEP Vancouver Branch | Member, STEP Okanagan Chapter*

“ In my role within a fee-only financial planning firm, estate planning is an important area of our practice. I am taking the STEP Diploma program so that I am better able to serve our clients' needs. Since joining STEP as a student member in 2009, the courses I took, together with the articles in the STEP Inside and STEP Journal magazines, proved valuable in expanding my knowledge of the trust and estate area. In turn, my day-to-day work reinforces the knowledge I gain in the courses and reading; this is truly a positive feedback loop! ”

*Ngoc Day, CFP, CIM, RFP, TEP
Associate Financial Advisor | Macdonald, Shymko & Company Ltd.
Member, STEP Vancouver Branch*



STEP CANADA BRANCHES & CHAPTERS

VANCOUVER | EDMONTON

CALGARY | WINNIPEG

TORONTO | OTTAWA

MONTRÉAL | ATLANTIC

LONDON & SOUTHWESTERN ONTARIO

OKANAGAN | SASKATCHEWAN

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