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STEP CANADA
Supporting trust and estate practitioners in their pursuit of excellence

2026-27 EDUCATION SEMINARS & EVENTS

SEPTEMBER 2026 — BUNDLE SEMINAR – LOCAL EVENT

Wednesday, September 16, 2026 @ 2:30 pm AT
Stewart McKelvey Offices Across the Atlantic Provinces

Send Me Your File | Speaker: Justice Stephen J. Doucet, LLB, Moncton: The New Brunswick Court of King's Bench
Join us in welcoming Justice Stephen Doucet, Judge of the Court of King's Bench of New Brunswick, Trial Division to give us tales from the Bench in contested and contentious estates – from all sides. Professionals might take away what makes a "good" client file.

SEPTEMBER 2026 — SEPARATE FROM BUNDLE

Wednesday, September 16, 2026 @ 5:00 pm AT
Stewart McKelvey, Queen's Marque, 600-1741 Lower Water Street, Halifax

Welcome Back Reception | *Social Event*

NOVEMBER 2026 — BUNDLE SEMINAR – LOCAL EVENT

Thursday, November 19, 2026 @ 2:30 pm AT
Stewart McKelvey Offices Across the Atlantic Provinces

Local Finance Roundtable | Speaker: Kenneth Keung, CPA, CA, CPA (Colorado), CFP, MTax, LLB, TEP, Victoria: Doane Grant Thornton LLP
Join Kenneth Keung in diving into the implications of legislative changes and considerations from the Department of Finance, and the many consequences that changing rules, regulations, and rulings may have for STEP practitioners and their clients.

JANUARY 2027 — BUNDLE SEMINAR – LOCAL EVENT

Thursday, January 28, 2027 @ 2:30 pm AT
Stewart McKelvey Offices Across the Atlantic Provinces

Common Misconceptions in Estate Planning | Speakers: TBA
We've all seen it – an adult child is added to their aging parents' bank account, and all involved pat themselves on the back for an estate well-planned. Our panelists will consider those common planning misconceptions, their consequences, and how we as STEP practitioners can ensure they are avoided by our clients.

MARCH 2027 — SEPARATE FROM BUNDLE

Friday, March 5, 2027 @ 8:00 am AT
Halifax - Venue TBA

National Full-Day Course: Taxation at Death and Post Mortem Planning
Speakers: Chris Ireland, CPA, CA, TEP, Vancouver: Tellian Management Co. Ltd. & Kenneth Keung, CPA, CA, CPA (Colorado), CFP, MTax, LLB, TEP, Victoria: Doane Grant Thornton LLP

MARCH 2027 — BUNDLE SEMINAR – LOCAL EVENT

Thursday, March 25, 2027 @ 2:30 pm AT
Stewart McKelvey Offices Across the Atlantic Provinces

Incapacity Planning Considerations | Speakers: TBA
Join Elder Law specialists as they consider critical components of planning for incapacity. This will highlight the importance of those oft-overlooked "simple" documents, like Powers of Attorney, substitute healthcare decision-making powers, & guardianship appointments, and demonstrate how they interact.

MAY 2027 — BUNDLE SEMINAR - LOCAL EVENT

Thursday, May 13, 2027 @ 2:30 pm AT
Stewart McKelvey Offices Across the Atlantic Provinces

Pick Your Poison – Probate Taxes vs. The Rest | Speakers: Robbie Brown, CPA, CA, CFP, TEP, Halifax: Scotia Wealth Management; Benjamin Carver, LLB, TEP, Bridgewater: Carver Estate Law & Litigation; Amanda Doucette, LLB, LLM, TEP, Saskatoon: Stevenson Hood Thornton Beaubier LLP
Perhaps you've avoided one tax bill – but have you created another? Amanda Doucette, Robbie Brown, and Benjamin Carver will take us through the tax consequences of probate planning, highlighting who ends up with which tax bill, how pitfalls can be avoided, and the differences across the Atlantic Provinces.

MAY 2027 — BUNDLE SEMINAR – LOCAL EVENT

Thursday, May 13, 2027 @ 5:00 pm AT
Halifax - Venue TBA

Sparkling Reception & Annual Branch Meeting | *Social Event*

STEP Atlantic Board Members are busy planning the 2026-27 program season and encourage you to save these dates! Details and registration will be available in August.

SAVE THE DATE!
29th National Conference on June 7-8, 2027
Visit **step.ca** for complete details and registration information.