

## 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 email only.

- A letter of good standing for the credential obtained, the letter **must have the date the credential was obtained**, or attach a copy of your credential certificate (obtained within 5 years)
- A course syllabus and transcript if you are applying with a course (completed within the last 5 years)
- All necessary signatures, dated, payment information

**STEP Canada Education Team**

**education@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): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### 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
- Taxation of Trusts & Estates
  - CPA In-depth Tax Course (Parts I - III) **AND** In-depth Tax Issues for the Owner-Managed Business
  - 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
  - STEP Canada CETA certificate holder
  - Law School Course Equivalent
- Trust & Estate Planning
  - Advocis/The Institute: CLU #257 (Advanced Estate Planning)
  - CFP designation from FPSC obtained within last 5 years
  - Pl. Fin. From IQPF obtained within last 5 years
- Other\*, please specify the course or credential you consider to be broadly equivalent:  
\_\_\_\_\_  
\_\_\_\_\_

### 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)

I authorize you to debit my Visa / MasterCard / AMEX

Name on card: \_\_\_\_\_

Card number: \_\_\_\_\_

Card expiry date: MM/YYYY\_\_\_\_\_/

**CVD** \_\_\_\_\_

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.*