Steve Meldrum, B.Mgt., CFP, CLU, FEA

Corporate Insurance Specialist, Swell Private Wealth

Steve is the corporate insurance specialist at Swell Private Wealth Ltd. He's a contrarian by nature and loves getting deep into tax. His practice trains accountants how to integrate insurance solutions into their advisory models. Steve's mantra is to CRUSH TAX, both now and in the future. When there's a challenging problem to solve, he dives all in to bring value to the table.

Steve is a designated Family Enterprise Advisor, Chartered Life Underwriter and Certified Financial Planner. He obtained a Bachelor of Management degree with a double major in finance and marketing from the University of Lethbridge and studied international finance at the Universidad de Panamericana in Guadalajara Mexico.

He's enrolled in the Chartered Professional Accountants In-Depth Tax Program and the Society of Trust and Estate Practitioners Trust and Estate Practitioner designation.

Steve's an authority within the Canadian insurance industry and frequent contributor to industry and accounting publications and events. He believes that simplicity brings clarity and seeks to answer tax, estate, and legacy complexities through this lens.

Steve currently serves on the board of directors for the Conference for Advanced Life Underwriting (CALU).