



Steve Meldrum, B.Mgt. CFP® CLU® FEA

Founder, Corporate Insurance Specialist, Swell Private Wealth Ltd.



Steve Meldrum is the founder and corporate insurance specialist of Swell Private Wealth Ltd. He primarily works with accountants who integrate insurance solutions into their advisory practices. He's also the author of *Estate Planning with Life Insurance*, published through Wolters Kluwer.

Steve currently serves on the board of directors for the Conference for Advanced Life Underwriting (CALU) and is a member of the Canadian Tax Foundation and Family Enterprise Canada. Additionally, he is enrolled in the Chartered Professional Accountants In-Depth Tax Program and the Society of Trust and Estate Practitioners Trust and Estate Practitioner designation.

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