



Jeff Sniderman, MBA, CFP, TEP, EPC, CLU, CH.F.C.

Estate Planning Specialist
First Vice-President

Jeff Sniderman is an Estate Planning Specialist with extensive experience and education in the financial services industry. He received his MBA from York in 1982 and was a producer in the film and television industry during the 1980s. In 1990 Jeff moved to financial services enrolling in the CA program at McGill. From 1993 to 1998 he built a financial planning and insurance practice in Montreal focusing on the entertainment and high tech industries while earning his Chartered Life Underwriter designation.

In 1998 Jeff moved to Toronto to become vice-president of a financial planning firm working exclusively with high net-worth clients. He subsequently earned the Certified Financial Planner, Chartered Financial Consultant, Registered Financial Planner, Trust and Estate Practitioner and Elder Planning Counselor designations.

Jeff joined Merrill Lynch, now CIBC Wood Gundy, in 2001 and works with investment advisors and their clients in the Brookfield Place offices in downtown Toronto. His areas of practice include family wealth transfer, retirement and estate planning, charitable gift planning, as well as business succession planning.

He is a member of numerous professional organizations including: Advocis, The Society of Trust and Estate Practitioners, The Estate Planning Council of Toronto and The Canadian Association of Gift Planners where he is Vice-chair of the GTA RoundTable. He has served on the editorial board of *The Canadian Journal of Financial Planning* and is a featured speaker at industry conferences, seminars and workshops.



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