Patrick E. Uzan, BA (Econ.), CPA, CA, TEP, CLU

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Patrick joined Canada Life in 2012. Having 24 years of tax planning experience, Patrick assists financial advisors in delivering value-added services to a select group of clients in the business and affluent markets by helping them develop and implement estate and tax planning strategies.

Prior to joining Canada Life, Patrick was a tax partner with a local chartered accounting firm in London, Ontario. He worked closely with general CA practitioners in advising them on tax matters and providing specialty tax planning solutions for their clients.

Throughout his career, Patrick's focus has been primarily in the areas of succession and estate planning and corporate reorganizations.

Patrick has also been involved in educational and academic endeavours including presenting tax courses and authoring papers and articles. He continues to be involved in various committees and task groups for the Conference for Advanced Life Underwriting (CALU) and facilitates tax courses for CPA Alberta. He has acted as a group-study leader and in-residence tutorial leader in CPA Canada's In-Depth Tax program and "Income Tax for the General Practitioner" course.

Patrick graduated from McGill University, where he obtained his Bachelor of Arts in economics, and Concordia University, where he obtained a post-graduate accounting diploma. He earned his Chartered Accountant designation from the Institute of Chartered Accountants of Alberta. He is also a registered member of the Society of Trust and Estate Practitioners, a Chartered Life Underwriter, an active member of Advocis and an Associate Member of CALU.