Jamie Golombek – biographical notes

Jamie Golombek, CA, CPA, CFP, CLU, TEP

Vice President, Tax & Estate Planning
AIM Trimark Investments

Jamie originally joined AIM Trimark in 1996. His work involves both internal and external consulting on all areas of taxation and estate planning. He is also responsible for AIM Trimark's Tax & Estate InfoService, which provides detailed information to financial advisors on various tax & estate planning inquiries. Jamie is quoted frequently in the national media as an expert on taxation, writes a weekly column called "The Tax Expert" in the *National Post* and is a monthly columnist for both Advocis' *Forum* magazine, a trade journal for financial advisors, as well as *Advisor's Edge Report.*

Prior to joining AIM Trimark, Jamie was a tax specialist in the Toronto office of Deloitte & Touche, where he specialized in both personal and corporate tax planning. He received his B.Comm. from McGill University, earned his CA designation in Ontario and also qualified as a U.S. CPA in Illinois. He has also obtained his Certified Financial Planning (CFP) designation and most recently was awarded his Chartered Life Underwriting (CLU) designation.

Jamie is the current chair of the Investment Funds Institute of Canada's Tax Working Group as well as a member of the Ontario Institute of Chartered Accountants, the Illinois CPA Society, the Estate Planning Council of Toronto, the Canadian Tax Foundation and the Society of Trust and Estate Practitioners. In his spare time, Jamie teaches an MBA course in Personal Finance at the Schulich School of Business at York University in Toronto.

Jamie is well known in the financial planning and brokerage community for his ability to communicate complex tax & estate planning ideas and strategies in an easy-to-understand and interesting manner.

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