

**Jennifer Poon, CPA, CA, CFP**

**Director, Advanced Planning, Wealth**

Jennifer Poon is the Director of Advanced Planning, Wealth, at Sun Life Financial. Jennifer, in partnership with the Wealth Distribution team, works with advisors to understand Sun Life Financial and Sun Life Global Investments wealth products and provide tax and estate solutions for their clients. In addition, Jennifer provides expert support, national training and knowledge sharing of relevant tax topics to support the Sales Distribution teams.

Jennifer received an HBBA from Wilfrid Laurier University. She holds the Chartered Accountant (CA), and Certified Financial Planner (CFP) designations, and is currently working on her Trust and Estate Practitioner (TEP) designation. Jennifer joined Sun Life Financial in 2014 from Fidelity Investments where she was Director, Product Solutions. Jennifer has 14 years of experience in financial services and a proven record of delivering results through innovative strategies and process improvement. With a passion for public speaking, she has a unique ability to thoughtfully and effectively share complicated concepts in useful, relative terms.