



Stephanie Wong, CFP®

Insurance Sales Director

Stephanie brings over 17 years of experience in the financial planning industry. With a history of sales management on both the investment and insurance side of our industry, she is passionate about creating holistic insurance plans that offer more than a death benefit.

Stephanie is passionate about working with financial advisors to build dreams, legacies, and social capital. She is a member of the Canadian Association of Gift Planners and proudly carries the CFP® designation. Stephanie resides in White Rock, BC and enjoys spending time with her 5-year-old daughter at the beach. Stephanie is bilingual, fluent in English and Cantonese.

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