



**Vice President
Business Development**



Ann Wong, BA, CFP®, FMA, RIS, FCSI

Ann has been working in the financial services industry since 1996. As Vice President of Business Development, she is responsible for guiding financial professionals through practice management processes. She is dedicated to working with credit union teams to excel in their daily operations with a focus on member-centered wealth management services.

Ann began her career with one of Canada's largest insurance companies and gained valuable experience in group benefits, investments, and insurance. Subsequently, she became a Branch Manager at a leading securities dealer. She further developed her investment experience at one of the big Five Banks in their asset management division. She spent over ten years wholesaling and coaching Financial Advisors in BC, Alberta, and Saskatchewan on mutual funds and private wealth investment strategies and practice management with an emphasis on process improvement.

Education is a fundamental component in Ann's approach. After completing her Bachelor of Arts (BA) degree from the University of British Columbia, she developed her career by successfully completing numerous industry courses. She is a lifelong learner seeking to constantly improve herself and therefore improve her ability to help others. Ann has achieved industry respected designations: Certified Financial Planner (CFP), Financial Management Advisor (FMA), Responsible Investment Specialist (RIS), and is also a Fellow of the Canadian Securities Institute (FCSI). She regularly attends webinars and industry conferences as well as pursuing industry designations.

As a wife and a mother of two, Ann cherishes the moments spent with her family. In her spare time, she enjoys traveling, hiking, and yoga. She is deeply entrenched in her community through her volunteer work at local schools and seniors' centers. She is honoured to be the recipient of the prestigious Queen Elizabeth II Diamond Jubilee Medal for significant contributions and achievements to her community.