

# CTC | myCFO professional profile



## Susanna M. Poon

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Susanna Poon is the Director of Philanthropy Services with CTC | myCFO, an integrated wealth management provider that serves ultra-affluent individuals, families and family offices across their tax, estate, investment, philanthropic, risk and family capital needs.

Susanna joined the organization in 2015 and has 9 years of estate planning experience. She is responsible for delivering comprehensive family office solutions to individuals and families of substantial wealth and specializes in estate, philanthropy and trust planning. She also counsels clients on sophisticated tax saving and wealth preservation strategies. Specifically, Susanna works with clients to help them develop and refine their charitable goals, set up and maintain private family foundations and donor advised fund accounts, negotiate charitable gift agreements with charitable beneficiaries and educate family members on philanthropic issues. She also helps to oversee the administration of the BMO Charitable Fund ([www.bmo.com/charitablefund](http://www.bmo.com/charitablefund)) through the National Philanthropic Trust (a public charity that sponsors donor advised funds). The BMO Charitable Fund offers our clients a simple, tax efficient vehicle for their philanthropic giving.

Prior to joining CTC | myCFO, Susanna was a practicing attorney in San Francisco, where she specialized in estate planning and philanthropic planning.

Ms. Poon earned a BA in political science and a BS in communication studies from Boston University, where she graduated *magna cum laude*. She earned her JD from the UCLA School of Law in Los Angeles, California.

Susanna is a member of the State Bar of California and Asian American Bar Association. She currently is involved with the Full Circle Fund where she serves as Chair of the Membership Committee and formerly served on the Gala Host Committee. She is a supporter of Founders' Pledge, a new vehicle for early stage companies and founders to pledge equity, time and money to support Bay Area nonprofits.

She lives in San Francisco, California, where she enjoys travel, outdoor adventures, photography, wine, food, hiking, swimming and yoga.

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