Planning for your Client's Aging Parents

Cheryl Norton, CPA, CA, CFP

Regional Vice President, Wealth Planning, Assante Private Client

As Regional Vice-President, Wealth Planning, Cheryl Norton works closely with our high net worth clients to identify issues and provide complex, tactical wealth planning support that complements their wealth plans. Cheryl has a particular focus on tax and estate planning strategies for business owners, farmers, professionals and other affluent individuals and families.

Cheryl joined CI Assante Private Client in 2018 after delivering tax planning services primarily in two multi-national public accounting firms, as well as holding senior tax and estate planning positions in the financial services and insurance industry. Cheryl's expertise includes tax, estate and trust planning, business succession planning, intergenerational wealth transfer strategies, risk management, philanthropy and charitable giving. Her overall professional experience in tax and wealth planning exceeds 20 years.

Cheryl is a Chartered Professional Accountant (CPA, CA) with a Bachelor of Commerce degree from the University of Windsor. She has also obtained her Certified Financial Planner® designation. In addition, Cheryl is a member of the Chartered Professional Accountants of British Columbia (CPABC) and has completed the CICA In-Depth Tax Course and has acted as a group leader for this course.