

Lo Ho Lung, Alan, CFA

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I am a fast learner with strong analytical mind. The experience in CVC provides me the opportunity to familiar with the investment decision process and financial analysis. To move on and be an analyst, I studied the CFA program and became a charter holder in last December.

Work Experience

01/2016 – Present (4 months)

CVC Asia Pacific Ltd, Finance Manager

01/2013 – 12/2015 (3 years)

CVC Asia Pacific Ltd, Associate Finance Manager

Key achievements:

- 2013: Participated in CVC Asia Fund IV (US\$3.5 bn) fund raising: Involved in preparing pitch book and due diligence pack, and setting up presentations and due diligence sessions in Four Seasons and Shangri-La hotels

Responsibilities:

- Provide support in preparing PIR/FIR to investment committee and internal discussion materials, e.g. extract the useful data from BMAL, Bain and PwC reports to prepare the charts and tables in the proposals; search the market information through online sources; retrieve share price and currency movements from Bloomberg.
- Co-operate with IR team in fundraising, LPs conference and quarterly update call by preparing fund statistics and presentation materials
- Work with senior finance manager to prepare full sets of accounts and other accounting-related duties, such as financial analysis and reporting, liaison with auditor, and etc.
- Review financial statements of regional offices from accounting vendors and deliver monthly reports to Finance Controller in an accurate and timely manner
- Impose financial & regulatory control and monitor operating expenses in Asia offices.
- Maintain service relationships with auditors, tax consultants, banks and outsourcing companies

05/2010 - 12/2012 (2 years 8 months) **Chief Securities Limited, Dealing Officer**

- Executed trade orders and monitored order status in the Hong Kong securities market
- Provided investment advice to top-tier accounts based on reviewed market information and fundamental analysis
- Maintained close relationships with key stakeholders (e.g. wealthy individuals, HSBC, SCB, Infocast)
- Called deposits for any unsettled and shortfall amount to reduce the exposure to credit risk in branch level
- Managed and kept track of the financial position of top-tier accounts
- Assisted in achieving the team KPI target (e.g. account opening, trading volume) set by the management

06/2009 - 04/2010 (11 months)

PCCW, Account Executive (Commercial)

- Identified sales opportunities and achieved target by in-depth understanding on clients' business models
- Developed customized IT&T solutions to cope with clients' needs and monitored the implementation

Professional Qualification

12/2015 CFA® charterholder

Education

09/2006 - 05/2009 The Hong Kong Polytechnic University - BBA (Hons) Financial Services (1st class honors)
08/2007 - 12/2007 The University of Texas at San Antonio - Exchange Student

Key highlights

2008 SFA Investment Research Competition;
2008 SCMP/IFPHK Financial Planning Competition

Honors & Awards

2008 BNP Paribas Scholarship
2008 Wing Hang Bank Scholarship
2007 Outstanding Academic Achievement Award

Computer and Language Skills

- Proficiency in MS Word, Excel and PowerPoint
- Bloomberg terminal
- Good written English and Chinese, conversational English and Mandarin, native Cantonese
- Chinese typing (40 wpm)

Availability and Salary

- Availability: 1 month notice