

Poh Huan Zhi, Paul

• **Cellular Number:** (+65) 9239-7261 • **Email Address:** huanzhi@gmail.com

EDUCATION

National University of Singapore

Aug 09 – Feb 13

- Bachelor of Business Administration (Finance)
- Date of Graduation: Feb 2013

Competitions / Certifications

- Semi-Finalist in The Next Fund Manager Competition 2010
- Participated in Citibank FX Challenge 2009, 2010
- OCBC Securities Young Investor Programme (YIP) Ambassador (2009 – 2010)
- CACS I, CACS II, CMFAS Module 3 (Fund Management), Module 4A (Corporate Finance Advisory), Module 6 (Exempted)

WORK EXPERIENCE

UBS Wealth Management

Apr 16 - Present

Alternative Investments, Private Markets Singapore

- Distribution of Private Equity (PE), Real Estate (RE) strategies & Direct Investments (DI) to Wealth Management's HNW/UHNW/GFOs clients.
- Responsible for leading new PE fund launches, providing client portfolio reviews on past PEs, RE and DI offerings for Singapore based Client Advisors and their clients; Conducts private equity educational training to HNW/UHNW country teams and portfolio specialists.
- Achieved top producer status among APAC teams for UBS's first proprietary multi-vintage private equity solution fund raising at first close – contributed \$50m to overall ~\$250m raised. High client conversion rate in closing sizable PE fund commitments at meetings.
- Leveraged on big data and developed databases, tracking sheets and other information sources to track, monitor and analyze sales performance, client contacts and formulated sales strategies to promote penetration of Alternative Investments within clients' portfolio.

BNP Paribas Investment Partners

May 14 – Apr 16

Institutional Sales, FundQuest Advisor APAC

- Liaised with investment research specialists and financial engineering team in FundQuest Advisor (FQA) Paris and London, to build tailor made propositions, RFPs, (funds buy-lists selection, model portfolio, risk due diligence assessment) for institutional clients (sovereign wealth funds, pension funds, Singapore statutory boards, etc) in Asia Pacific. Pivotal participation in winning first institutional advisory mandate in Singapore.
- Business development: Established working relationship with coverage teams across APAC, uncovering financial institutional markets; Clients prospecting: Fund conferences networking & cold calling; Conduct roadshows, sales pitches to demonstrate FQA capabilities.
- Business management: Obtained South Korea FSS licence for FQA activities with Shinhan Bank (BNPP IP Joint Venture)
- Product Advisory & Development: Provided FoF strategies proposals based on Europe's research analysts' recommendations to APAC institutional clients; Developed new service offerings & marketing materials to meet APAC clients' needs.

Deutsche Bank, Asset Management

Mar 13 – Mar 14

Intermediary Sales, South East Asia (1-year Contract)

- Assisted the funds sales team by preparing standard pitch books, marketing materials, RFPs & presentations.
- Supported road shows for products such as the DWS Invest RREEF Global Real Estate Securities to private banks.
- Worked closely with the Deutsche RREEF & Private Wealth teams in launching new products to South Asia distributors and key clients.
- Fund updates/analystics – Morningstar analysis (identified new products opportunities) & peer group updates.

TEQ Capital Pte Ltd

May 12 – Jul 12

Intern

- Identified Thailand based private investors for the issuance of US\$5 million corporate bonds.
- Pitched for and facilitated a business meeting with a potential investor from Thailand.
- Structured an alternative investment tailored to a private investor's risk appetite via a Convertible Loan Agreement.

Citibank, Singapore

Jan 12 – May 12

Summer Internship

- Executed & participated in the development of Citigold and Citigold Private Client marketing programs.

J & P Partnership LLP

Dec 10 – Dec 11

Managing Partner

- Pioneered Internet-based car buying concept in Singapore (<http://joompr.com>), featured in The Business Times on 16th March 2011, and online media outlets like AsiaOne, ST701 by SPH and DailyDealMedia.
- Pitched for and won mandates to market cars and automotive related products from large and established companies.
- Partnered with one of Singapore's largest daily deal websites in the provision of automotive related products.

EXTERNAL ACTIVITIES

Musical Interest

- Volunteered at Asian Women's Welfare Association (AWWA) Lantern Festival with on stage Chinese Violin (Erhu) performance. (2009)
- Charity Piano Performance for the elderly at The Heeren with Music Clef Pte Ltd. (2008)

Sports

- Achieved 3rd in 2009 NUS Inter-Faculty Games Men Singles Bowling and Overall 3rd for team. (2009)

Skills

- Proficient in Microsoft Office (Word, PowerPoint, Excel, VBA Programming, Outlook).
- Proficient in operating Bloomberg Terminal, Launchpad 2010, Morningstar Direct, Lotus Notes.

Languages

- Proficient in both verbal and written forms of English and Mandarin (Distinction Award in HSK Chinese Proficiency Test by Beijing Language and Culture University).