

**Tan Yong An Wilson, CFA CA**

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## **SUMMARY STATEMENT**

A strong and independent CFA and CA qualified financial professional with the desire to excel and set new working standards. Always seeking new ways of self-improvement and constantly striving to improve the quality of work. A fast learner and strong team player and manager who loves new challenges and responsibilities. Quick adaptability to new situations, environment and people.

## **EDUCATION AND TRAINING**

**Association of Chartered Certified Accountants (ACCA), 2016**

**Chartered Accountant of Singapore (CA), 2015**

**Kaizen Lean Six Sigma Yellow Belt Qualified, 2014**

**Chartered Financial Analyst (CFA) Holder, 2013**

**FICS- Analyst Training Program (awarded by CFA Singapore), 2012**

**University of London, London School of Economics & Political Science (LSE External), 2010**  
Banking & Finance, First Class Honors Bachelor Degree

## **PROFESSIONAL EXPERIENCE**

**MUFG Investor Services, Singapore**

**Deputy Head of Client Services, Singapore | Jan 2017 – Present**

**Head of Client Servicing and Fund Valuation | Jan 2016 – Dec 2016**

- Assist with the integration of the UBS business to MUFG Investor Services
- Assist the Head of Asia Pacific in managing the business and Singapore office
- Participate in sale pitch and RFP on behalf of the company
- Work with new clients on their onboarding and transition
- In charge of all Client Services staffs in Singapore and their portfolio allocation
- Generate report and presentation for senior management regarding the team current status (Revenue and Asset under Administration)
- Escalation point for clients and all investor if necessary
- Regular meetup with clients and stakeholders to collect and action on their feedback
- Member of the Global Product and Service Development committee
- Assist clients with regulatory communication and update (e.g. FATCA/CRS/SVACC/Outsourcing)

**UBS AG, Singapore**

**Group Head (Hedge Fund and Private Equity Client Servicing) | Sep 2014-Dec 2015**

- Manage both the Hedge Fund and Private Equity Fund Accounting department
- Plan and allocate work load of accountants
- Interview candidate for new role
- Manage accountants' progression and career advancement during year end appraisal
- Retain accounts through the development of strong relationships with key decision makers
- Organizing, initiating and lead brainstorm sessions.

### **Deputy Group Head (Hedge Fund and Private Equity Client Servicing) | Sep 2012-Sept 2014**

- Perform review of financial statements and fully reconcile exceptions
- New clients' integration and on-boarding
- Perform full KYC and due diligence on potential new investment managers and investors
- Supervisory review of daily and month end sign-offs
- Assisting with year-end audit of financial statements for the funds under management
- Experienced in China RQFII and QFII mandate and requirements
- Spearheaded training initiatives to minimize knowledge gaps for relatively inexperienced teammates.

#### **NOTABLE ACCOMPLISHMENTS:**

- Consistently recognized for exceptional performance, stepping up to manage a team within less than 6 months & being promoted to the role of Deputy Group Head less than a year later and the role of Group Head a year later.
- Played an integral role for the new Singapore APAC office set up as one of its pioneer members, assisting with marketing and sales pitches on behalf of APAC Fund Services. Deals clinched translated to a significant increase in the client pool, achieving more than 100% AUM growth in the first year.
- Won over clients by delivering high service quality, with these efforts resulting in numerous accolades received during the 2013 Asian Investor Awards and highlighted mentions to senior management. Successfully clinched 4 business referrals for the Bank.
- Demonstrated excellent communication and presentation skills, representing APAC Fund Services in overseas sales pitches to investment managers alongside with the Business Development Director based in Hong Kong.
- Handpicked by the APAC Business Development Group Head to be the APAC Fund Services representative for new business initiatives, flying over to Hong Kong/China for field investigations and thereafter presenting the findings to senior management.
- Chosen by senior management to be part of a focus group to discuss the feasibility of setting up other new APAC offices.

### **Citco Fund Services, Singapore**

#### **Senior Hedge Fund Accountant | Sep 2010-Sept 2012**

- Performing Net Asset Value (NAV) calculations and Risk analysis for a portfolio of hedge funds with total Assets Under Management (AUM) of USD\$ 1 billion
- Stimulation testing of assets' Fair Value using excel-based financial spreadsheets and Bloomberg model
- Functional expertise in Equalization Funds/Series Funds/Fund of Funds and well-versed in the various hedge fund strategies (Long/Short, Market Neutral, Global Macro etc.)
- Analyzing and performing due diligence on fund's trading mandate, monitoring fund compliance the offering prospectus

#### **NOTABLE ACCOMPLISHMENTS:**

- Started off as a Fund Accountant and promoted to Senior Fund Accountant within less than a year.
- Spearheaded various projects to streamline operation flow, which significantly reduced overtime hours of the team thus increasing efficiency and profitability for the firm.
- In charge of an initiative to document process flow as part of active workflow planning which was eventually used across the wider team for new hire training.
- On-going dialogue with various Investment Manager to understand their portfolios and thereby presenting risk analysis of the Fund Accounting business to senior management.

### **ACTIVITIES**

- Represented UBS in the nationwide Dragon boat competition (2013)
- Student Leader for University Freshman Orientation Day (2009)
- School Representative in Inter-University Dragon boat competition (2009)
- Student Council Member for University of London (2008 – 2009)

## **Systems**

Geneva Advent, Geneva Ephesus, Aexeo (Hedge fund accounting)

NTAS and HWM Mantra (Investor Relation)

Investran Sungard (Private Equity)

Proficient in Microsoft Office Applications

## **REFERENCES –available upon request**