

Alan Benjamin He Xu, Chartered Accountant

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SUMMARY

Accounting and finance major with relevant internship experiences at an Australian Private Bank and a French Investment Bank. Proven ability to assemble data, conduct research, perform analysis and solve problems in a fast-paced international team working environment, with passion about financial service and strength in client relationship management. Possess international backgrounds and open to overseas travel requirements.

ACADEMIC QUALIFICATIONS

Singapore Management University (SMU) Aug 2012 - Jan 2017

- Fresh Graduate with Bachelor Degree of Accountancy & Finance - High Merit
- Major Term GPA: 3.66/4.0

Université Paris Dauphine (Paris IX) Jan 2015 - May 2015

- International Exchange Program in Paris, France

AWARDS AND HONOURS

- Global Champion of Credit Suisse HOLT Stock Valuation Challenge 2014
- SMUSA-BIZCOM CCA Scholar 2013
- School of Accountancy (SOA) International Experience Fund Recipient 2013

WORK EXPERIENCES

Westpac Private Bank, Singapore May 2016 - Aug 2016

Private Banking Summer Analyst

- Analysed portfolios of UHNW individual and corporate clients in Singapore & Hong Kong and assisted Relationship Managers to understand clients with my monthly analytics in order to make strategic sales plans
- Drafted 35 due diligence client profile write-ups for new on-boarding private clients and 47 periodic reviews of existing private clients regarding their source of wealth and risk assessment to expedite processing

BNP Paribas, Singapore Feb 2014 - Dec 2014

Global Transaction Banking Analyst Intern

- Implemented 6 cycles of monthly transaction data monitoring project of the entire BNPP branches network and built Excel financial models for periodic performance analysis & trend forecast
- Drafted comprehensive and succinct user-guide based on the new CNY currency clearing regulations to help institutional clients comply with the complexed clearing rules, which avoided large amount of potential transaction rejections and saved substantial transaction time

Guidepoint Global, Singapore Aug 2013 - Nov 2013

Research Analyst Intern

- Conducted in-depth market researches per clients' requests, identified suitable consultants from the internal consultant database and liaised with consultants to assess their relevance and expertise to the project

LEADERSHIP/CO-CURRICULAR ACTIVITIES

Right-side Rower, SMU Dragonboat Team Aug 2015 - Dec 2016

- Participated and won 4 team medals in the International Pesta Dragonboat Race 2016 in Malaysia

Model, Abercrombie & Fitch Sep 2015 - Feb 2016

- Developed customer relationships through friendly engagements and met daily projected sales goal

Fund-raising Manager, Project Wings Overseas Community Service Sep 2013 - Dec 2013

- Planned and executed fund-raising project, as well as successfully got sponsorship from Uniqlo to provide winter clothes for underprivileged children at Sha Kou primary school in Wuhan, China

Certified Lifeguard, Morey's Piers & Beachfront Waterparks May 2013 - Jul 2013

- Awarded as one of the "Best Lifeguard" of the season 2013 in New Jersey, United States of America

IT & LANGUAGE SKILLS

- Advanced user of Excel, Word, PowerPoint, and Bloomberg
- Native/bilingual proficiency in American English and Mandarin