

## LIN, Yuk Lun (Kenneth), CFA, FRM

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**Mobile** : +852 94537533  
**Email** : kennethlinyl@gmail.com  
**Available date** : 2 months notification period

### Working experience

#### ● Manulife Asset Management (Asia)

**Position Title** : **Manager** **Mar 2016 - Present**

**Department** : Management Reporting & Analysis

**Job description** :

- Prepare monthly and quarterly regional commentary on financial (e.g. Net Profit, expenses) and non-financial (e.g. Flows, AUM), especially focus on Hong Kong, China, Japan, Singapore and Taiwan.
- Prepare regular country dashboard and strategic initiatives update to all local countries senior management to provide an update on various KPIs performance and the Headwinds/Tailwinds of the business.
- Participate in annual budgeting process to collect various data from local countries by establishing a standard input template. Prepare a consolidated deck for the presentation to senior management and upload the plan data to the Essbase system.
- Generate monthly key metrics report with variance and trend analysis and as the original source of data.
- Maintain a large set of regional database including actual and plan data in different cubes of Essbase.
- Prepare ad-hoc analysis on various request from senior management and business team.

#### ● Sun Life Financial

**Position Title** : **Assistant Manager** **Oct 2015 - Mar 2016**

**Department** : Financial Planning & Analysis

**Job description** :

- Involve in financial planning processes and annual budgeting. Make analysis on variance against plan and prior year, communicate with different departments to understand and explain the variances and trends.
- Prepare management and financial reports, and presentation materials for senior management.
- Monitor the monthly expenses of the company and manage the cost allocation.
- Maintain the actual and budget financial database in TM1 system.
- Prepare commentaries on expenses analysis versus budget plan.
- Prepare ad-hoc analysis and analytical report on expenses management.

**Position Title : Management Associate Oct 2013 - Sep 2015**

**Division : Financial Services**

**Job description : Treasury**

- Manage the company's cash flow to ensure smooth day-to-day operations. Perform data analysis to forecast future cash flow to prepare and accommodate for unexpected expenses or cash outflow.
- Communicate with bankers for daily banking services including obtaining the best time deposit rates, dealing in derivatives such as currency forward and purchasing of certificate of deposits.
- Establish friendly relationship with banks and explore potential business opportunities.

**Enterprise Risk Management**

- Conduct risk and control assessment and key risk indicator monitoring, and ensure the operational risk level of the company is properly identified.
- Analyze and monitor various financial risk factors such as interest rate risk, credit risk and economic risk by applying various risk models to ensure the risk exposures of the investment portfolios are within their specified thresholds.

**Finance**

- Prepare accounting vouchers for the Group companies in comply with the Canadian GAAP & HK GAAP
- Prepare regular and ad hoc reports to various internal and external parties
- Prepare monthly and quarterly financial schedules
- Prepare a/c journals and reconciliation for investments

**Investment**

- Keep abreast of the latest news and trends of the global financial market performance, provide global economic outlook analysis to assist investment decision making.
- Prepare investment reports and performance dashboard related to investment strategy, performance and reporting to facilitate investment management.
- Have regular meeting with fund manager to monitor the fund performance, and manage the fund allocation to achieve better investment return

● **Bank of China (Hong Kong)**

**Position Title : Senior Operation Officer Jul 2011 - Sep 2013**

**Department : Planning and Administration Division of Bank-Wide Operation Department**

- Job description :**
- Handle Lean Six Sigma project to reengineer business process and reduce the non-value-added steps in order to improve the productivity and process quality.
  - Analyze daily production report to monitor process capability and control the

output quality. Take immediate action to rectify the fault when there is signal of malfunction.

- Carry out internal auditing to review and update internal policies and process workflow to ensure all business procedures are in compliance with the regulatory requirements.
- Design new IT system to facilitate business development and to improve business efficiency and productivity. Ensure all IT systems are up to date with technical and industry developments. Monitor system performance to achieve optimal operating efficiency.
- Provide regular professional Lean Six Sigma training to department staff to improve the overall technical and business knowledge standard.

● **Department of Economics, CUHK**

**Position Title** : **Research Assistant** **Aug 2009 - Jul 2011**

**Job description** : ➤ Analyse financial and economic data from various data base such as Bloomberg and Datastream, to interpret the economic implications  
➤ Assist professors in thesis research on various economic topics

**Education**

**M.Phil. in Economics**, The Chinese University of Hong Kong (CUHK) 2009 - 2011

➤ Research topic: What affects stock market turnover rate all over the world?

**B.S.SC in Economics**, The Chinese University of Hong Kong (CUHK) 2006 - 2009

➤ **First Class Honours**, minor in Finance

**Personal qualification**

- Chartered Financial Analyst (CFA)
- Certified Financial Risk Manager (FRM)
- Fellow, Life Management Institute (FLMI), LOMA
- Certified Lean Six Sigma Green Belt
- HKSI Licensing Examination for Securities and Futures Intermediaries Paper 1, 7, 8
- Insurance Intermediaries Qualifying Examination Paper I, III, V

**Additional skills**

**Languages** : Proficient in English, Mandarin, Cantonese

**Computer Skills** : Advanced in MS Word, Excel, Powerpoint, VBA, Essbase, TM1

**Data Collecting** : Bloomberg, Datastream, Worldscope