



Terence Neo

Singaporean Chinese, born 1985

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ABOUT ME

With 6 years of experience in the wealth management industry, I am highly result driven and equipped with great interpersonal skills. Having strong sales and business development experience in both financial advisory and private equity, I have established a comprehensive background in investment products and building customer relationships.

I am also a firm believer that effective communication is one of the key in building a profitable and sustainable business.

PROFESSIONAL EXPERIENCES



ZACD, Senior Manager (Relationship Management)

Dec 2015 - Present

Actively participating in networking sessions to seek out new potential clients/business partners for ZACD's Private Equity Real Estate funds and External Asset Management Services.

Create and maintain meaningful relationships with both existing and potential investors to build a stronger customer relationship and maximize long-term revenue opportunities.

Source for potential investment opportunities for ZACD to undertake.



OCBC Bank, Premier Relationship Manager

Oct 2014 - Nov 2015

Portfolio advisory on Stocks, Bonds, Structured Investments, Mutual funds and Universal life.

Identified tactical market opportunities amongst various asset classes and pitched ideas to clients.

Actively communicated latest house views and market outlook to clients.

Performed periodic portfolio rebalancing for clients, advising on optimal asset allocation and ideal instrument to gain relevant exposure.



One Asia Investment Partners, Sales and Distribution Associate

Mar 2014 - Jul 2014

Presentation of private equity projects to potential investors - Asset management firms/fund houses/corporates.

Generated interest in our private equity projects through both cold/warm leads both local and international.

Managed a small team of interns on business development to generate leads and product feedback.

**Citibank, Citigold Relationship Manager****Jan 2013 - Mar 2014**

Portfolio advisory on Bonds, Structured Investments, Mutual Funds and Universal Life.
Business development in acquiring new clients through referrals.
Communicated latest house views and market outlook to clients.

Citibank, Personal Banker**Nov 2010 - Dec 2012**

Wealth Management in Unit Trust and Insurance for the Mass Emerging Affluent Segment.
Qualifier for Champions League for 4th Quarter 2012 for achieving 110% revenue.
Top 5 winner of ZENITH MDRT Incentive trip to Bangkok for insurance revenue in 2011.
Qualifier for Champions League for month of June 2011 for achieving 125% revenue.

**Lexus, Marketing Executive****Jun 2010 - Nov 2010**

Assisted the marketing team in events/collaterals and competitor analysis.

EDUCATION**University of London (SIM)****Class 2007****Bachelor (Hon) in Science, Management – 2nd Class Upper****Singapore Polytechnic****Class 2002****Diploma in Business Information Technology****ACHIEVEMENTS**

Held the appointment of Head of Marketing in SIM Ultimate Frisbee Club.

Recipient of Flame of Merit for 2 consecutive year in SIM for outstanding conduct and participation in Ultimate Frisbee.

Finalist of the National Management Competition in 2008, which involves in making simulated business decisions based on scenarios over a 2 months period.

Winner of StompAIDS 2007, a nation-wide tertiary marketing competition organized by the Health Promotion Board.

LANGUAGES

English	Fluent (Read, Write and Speak)
Chinese	Fair (Read, Write and Speak)
Cantonese	Fair (Speak)