

## **WORK EXPERIENCE**

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**Guotai Junan International Holdings Limited | HK/Shenzhen**

**2013—Present**

**Equity Research Associate (Sell-side), Employment visa with current employer**

- Provided primary support to the analysts, mainly property sector( covering 11 HK listed property developers with major revenue from mainland market, capitalizations ranging from 2 billion to 200 billion).
- Developed and maintained annual and quarterly financial models; maintained multiple industry database.
- Coordinated and participated in meetings with institutional clients; developed solid and long term relationships with senior management of portfolio and target companies and facilitate transaction discussions.
- Assisted in equity research and prepared company write-ups, including in-depth reports of industrial data analysis, flash notes on actionable news.

**HSBC | HSBC China**

**2010—2013**

**HSBC Premier--Premier Relationship Manager**

- Oversaw 1,000 HNW customers, boosted core deposit amounts by 20-25%, improved clients' sales productivity by 30%.
- Formulated practical investment management solutions for high net worth clients, advised customers on investment options based on their financial needs.
- Cultivated client relationships, increased customer satisfaction level through expertise, developed new customers to optimize revenue potential.
- Collaborated with Hong Kong, Singapore and others business development team to promote cross-selling.

**Agricultural Bank of China | Shenzhen**

**2010**

- Internship: Assisted the relationship managers to conduct KYC, account opening and other production supports.

## **EDUCATION**

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**Tilburg University, The Netherlands**

2007-2010    BSc. Economics

**Shenzhen Senior High School, China**

2003-2006

## **ADDITIONAL**

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- SFC license Type 4
- Cantonese(Native), Mandarin(Native), English(Fluent)
- Thorough working knowledge of Bloomberg, WIND, CEIC, MS Office