

JOE C.Y. LEUNG

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PROFESSIONAL EXPERIENCE

PRICEWATERHOUSECOOPERS

Senior Associate, Assurance – Financial Services

Hong Kong

Oct. 2015 – Present

Associate, Assurance – Financial Services

Jan. 2014 – Sep. 2015

- Performed as “Senior-In-Charge” on assurance and advisory engagements on financial services companies, with focus in asset management industry, including experiences in hedge funds, private equity funds, fund of funds
- Performed financial statements analysis and financial risk management
- Performed valuation and analysis on structured investment products: equity, fixed income, options, and derivatives
- Reviewed due diligence reports on private unlisted investments
- Ensured regulatory compliance with SFC such as ADD, FRR, BRMQ, and AQ
- Ensured compliance with various reporting standards including: IFRS and US GAAP
- Selected client engagement experience:

- **RBS / UBP– Coutts International**

Hong Kong

- Worked with client to improve their Private Wealth practice (AML due diligence, compliance program evaluations, customer risk assessment, customer due diligence, and transaction monitoring) as part of Union Bancaire Privée’s acquisition from Royal Bank of Scotland

- **Hongkong and Shanghai Banking Corporation**

Hong Kong

- Assisted client’s transition from KPMG to PwC as their new accounting partner beginning 2015
- Prepared business development proposals for PwC Partners and Senior Managers
- Prepared and generated finance summaries (project budget management estimates) for HSBC Board Members

- **Bain Capital Public Equity**

Hong Kong

- Performed valuation on its PE portfolio and to validate management and advisory fees

- **JF Asset Management (J.P. Morgan Asset Management)**

Hong Kong

- Assessed client’s portfolio value and reconciled it to market trends and investigated discrepancies

- **Qilu International Holding Company Limited**

Hong Kong

- Generated financial projections client in preparation for Hong Kong G.E.M. board IPO listing

- **Huy Vietnam Group Limited (Vietnam)**

Hong Kong

- Worked with client to develop excel model that allowed them to project prices of raw materials based on previous historical patterns and proven reserves; client later used this as supplement to financial statements and in own internal projections to validate potential return on new restaurant outlets in lieu of IPO

- **Kafe Group Limited (Vietnam)**

Hong Kong

- Generated Vietnam client with near term financial projections for Hong Kong GEM board IPO listing

AIRPORT AUTHORITY HONG KONG

Hong Kong

Summer Trainee, Corporate Communications Department

Jul. 2012 – Aug. 2012

- Coordinated the 2012 Hong Kong Int’l Airport Job Expo, the largest industry-focused job expo, together with the Labor Department of HK; The Expo attracted 5,900 jobs openings from over 50 aviation industry companies

APEX ADVISORY GROUP

Los Angeles, CA

Summer Analyst

Jul. 2010 – Aug. 2010

- Learned about trading in foreign exchange and equity index futures markets

EDUCATION

UNIVERSITY OF CALIFORNIA, BERKELEY - HAAS SCHOOL OF BUSINESS

Berkeley, CA

Bachelor of Science, Business Administration

Aug. 2011 – Sep. 2013

Completed: Haas School of Business Undergraduate Experiential Learning Program

Finance workshop training modules (hosted by “Training the Street” – professional finance training program) participated:

- Corporate Valuation: Trained in various valuation techniques
- Mergers and Acquisitions / Leveraged Buyout Analysis: Learned to evaluate an array of M&A and LBO models

PASADENA CITY COLLEGE

Pasadena, CA

Completed Coursework in Business Administration

Sep. 2009 – Jun. 2011

- Dean’s Honor List: Fall 2009, Fall 2010, Spring 2011
- Member of Alpha Gamma Sigma Honor Society

ADDITIONAL INFORMATION

- Lived in Tokyo for 3 years, Hong Kong for 14 years, Los Angeles (Pasadena, San Marino Area) / San Francisco for 8 years.
- Languages: fluent in English and Cantonese, conversational in Mandarin
- Avid follower of NBA and usage of advanced basketball analytics / statistics