Allen J. Zhao

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**Professional Experience**

**KPMG Advisory** Hong Kong

Assistant Manager, Valuation and Modelling *Sep 2015 – Present*

* Conduct detailed valuation and financial modelling on real estate and infrastructure properties / projects / funds, including cash flow forecasting, value and return analysis, financing and tax structures, entry / exit assessment
* Advise clients through the process of feasibility studies, pre-investment evaluation and post-investment monitoring, M&A transaction due diligence and pricing support, and financial reporting
* Perform industry and market research, comparable transactions and companies research, yield / discount rate research
* Prepare presentations and memorandums in English and Chinese on project reports and ad-hoc market research and topics
* Assist in business development initiatives, prepare client pitching materials, participate in site visits and inspections

*Selected clients and projects:*

* Financial modelling / return analysis for HKD14bn **HK commercial development project** / **HK hotel redevelopment project** / **Shenzhen metro integrated development projects** / EUR450mm **European hostel fund** / **NYC condo project**
* Transaction / valuation support for **e-Shang Redwood** pre-IPO investment / **Vanke** acquisition with Shenzhen Metro **/ China Resources** overseas property JV
* Valuation review of investment properties in China and Hong Kong for listed property developers and funds, including **CapitaLand, Vanke, CITIC, Logan, SCPG, Top Spring, Fraser Hospitality, Kowloon Development, Henderson,** etc

**Ping An Securities** Shenzhen

Summer Intern, Fixed Income Trading *Jul - Aug 2015*

* Assisted in trade execution and monitoring of Chinese government bonds, corporate bonds, and credit derivatives
* Drafted daily Chinese and global capital market news update and risk monitoring report highlighting key capital market data and corporate developments through collecting and analysing information from various sources

**Education**

**University of Hong Kong** Hong Kong

Master of Finance, Financial Engineering*Jun 2015*

* GMAT: 760+6+8 (99th percentile)
* Coursework: spreadsheet modelling for financial/investment analysis, fixed income & interest rate modelling, credit analysis, risk management, derivatives & financial engineering, hedge fund / private equity /real estate investments

**Simon Fraser University** Burnaby, BC, Canada

Bachelor of Business Administration, Finance*Sep 2012*

* Graduated with Distinction; Dean’s Honour Roll
* Activities: Teaching assistant - Managerial economics; Semester exchange at HKU

***Professional Credentials:***

**Chartered Financial Analyst, CFA Institute:** Passed all 3 levels on first attempts

**Diploma in Accounting, University of British Columbia:** Completed courses accredited for CPA

**Skills & Additional**

**Computer:** Microsoft Excel, Access, Word, PowerPoint

Bloomberg, Capital IQ, Wind, ARGUS

Basic programming (VBA, SQL, Matlab, C++, Python)

**Languages:** Native Mandarin, Fluent English and Cantonese

**Interests:** Travelling, Hiking, Geopolitics, Investing