Rachel Chia (Singaporean nationality)

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**PROFESSIONAL EXPERIENCE**

**PIMCO** **Singapore**

*South Asia Business Development and Client Servicing Account Associate* Jun2016 – Now

* Part of a team of 5 covering South Asia institutions and distributors.
* Institutional client coverage includes SWFs, Central Banks, pension funds, insurance firms, university endowments across South Asia. Focus on Singapore, Philippines, Pakistan, Malaysia, Brunei and frontier markets such as Kazakhstan. Act as a back-up for Thailand and Indonesia.
* Distribution client coverage includes direct distribution or distribution of white-labelled funds across South Asia (ex-Singapore). Focus on Malaysia and Philippines, act as a back-up for Thailand and Indonesia.
* Hybrid role which covers client servicing, business development and cross-selling activities
* Business development tasks includes:
  + Strategy and planning in terms of mapping out the universe of prospects within South Asia and tier-ing them accordingly
  + Identification of client trends and investment risk profiles
  + Preparation of RFP due diligence questionnaires and finals presentation
  + Involvement in client / prospect meetings, including the preparation of presentation materials and follow-up tasks
* Client servicing tasks includes:
  + Preparation of portfolio review materials (performance attribution, portfolio statistics and market updates, etc.)
  + Preparation of recurring client reports on a monthly / quarterly / annually basis (eg. Guideline compliance, fund statistics, risk management and due diligence, etc.)
  + Handling ad-hoc queries from clients / prospects (eg. Market views and investment themes)

**HSBC** **Singapore**

*Banking Financial Institutional Group (FIG) Relationship Manager* Aug2014 – May2016

* Transferred from HK office to be a relationship management banker looking at overall relationship for buy-side clients, with focus on Asset Management firms, hedge funds and assisting a senior banker with large SWFs / Central Banks
* Well-familiarised with asset management industry (eg. Stock Connect / RQFII / FPI/ASEAN Passport)
* Seek opportunities in new markets, new channels and new lines of business with existing clients. Cultivate and deepen existing relationships with the aim of increasing market share. Identify cross-sell opportunities in Global Markets, Custody and Clearing Services, Payments and Cash Management, Capital Financing, etc
* Work together with Product Sales specialists to respond to RFPs, client queries and due diligence
* Conduct KYC, onboarding, monitoring / applying credit facilities, understanding risk analysis of specific clients
* Constant communication with C-suites, Executive Directors / Managing Directors, Treasurers, Finance Managers, to understand their needs and identify business development opportunities with the aim to increase market share
* Examples of transactions handled:
  + Pitched for real estate financing deal of USD160m based in China, with an onshore-offshore loan structure. Also looked at the structuring of an interest rate swap to fix interests for the floating-rate loan
  + Legal negotiations and obtaining necessary Risk approvals

**HSBC** **Hong Kong**

*Banking Financial Institutional Group (FIG) Associate* Aug2011 – Aug2014

* Part of the HSBC Global Banking Graduate Programme and was promoted to Associate within 2 years
* Attached to the Securities Coverage team of relationship managers who interact with corporate senior management (eg. Treasurer, Finance team, etc.) – covering both Multinational and Asian investment banks, broker-dealers, brokerages and clearing houses. A member of the regional team that is actively involved in deals across Asia Pacific
* Strategise and prepare client plans, revenue analysis, placemats and pitch books
* Examples of transactions handled:
  + Analysis of re-financing solutions and capital structure for a market leading broker-dealer that was undergoing acquisition
    - **Credit Rating Advisory Pre-Acquisition:** Pro-forma EBITDA and Revenue analysis to advise client on expected ratings and appropriate timing for obtaining ratings. Also advised on appropriate funding solutions (bond issuance versus bilateral/syndicated loans)
    - **USD100m Bilateral Loan Agreement:** Arranged a 1-year financing solution for the client post-acquisition. The company needed to shift their debt reliance away from their previous parent company. Did a pro-forma analysis of the acquirer company (the Guarantor) post-acquisition to negotiate suitable financial covenants for the loan agreement. Actively involved in LMA loan negotiation
    - **Credit Proposal Post-Acquisition:** Client was acquired by a corporate parent (previously owned by a bank). Credit Risk team saw this as a huge change in risk profile and requested for cutting of credit lines. Single-handedly prepared the credit proposal to convince Credit Risk team that no credit lines should be removed for the client
  + Involved in a bond issuer roadshow in HK, where we visited HK-based institutional investors
* Credit proposal for HKD1.5 – 3 billion syndicated loan facility for a Chinese broker-dealer
* Setting up working capital facilities for corporations (eg. revolving loan, overdraft, intra-day settlement facilities)
* Oversee legal negotiation for LMA loan documentation, ISDA and CSA

**HSBC Summer Internship** **Hong Kong**

*Global Banking Client Management Multi-Nationals Corporations (MNC) - Summer Analyst* Jun – Aug2010

* Was offered to join the HSBC Global Graduate Programme upon completion of the internship

**EDUCATION**

**National University of Singapore (NUS) Singapore**

*Bachelor of Business Administration (2nd Upper Class Honors)* 2011

* NUS Business Faculty Scholar
* Double Major in Finance and Marketing, GPA: 4.58/5.0
* Dean’s List in Academic Year 1 (Semester 1), Year 2 (Semester 1), Year 3 (Semester 1)

**Bocconi University’s Summer Programme Singapore**

*Summer Graduate course focusing on Investment Banking & Structured Finance* 2009

**University of British Columbia (UBC) Vancouver, Canada**

*Student Exchange Programme* 2009

**Victoria Junior College Singapore**

*GCE A Levels* 2006

* Awarded straight distinctions in Economics, Mathematics, Biology and Chemistry

**Anglican High School Singapore**

*GCE O Levels* 2004

* Awarded 7 A1s and 2 A2s

**SKILLS & AWARDS**

**Languages:** Fluent in English and Mandarin

**IT Skills:** Proficient in Microsoft Office, Lotus Notes

**Awards**

* Best Advocacy Skills Award for the International Chamber of Commerce (ICC) Mediation Competition
* Top 8 Global Finalists for the CIMA Global Business Case Competition (International Finals)
* NUS Business Faculty Scholarship: Awarded only to a handful of students in the entire cohort, based on excellent A Level results and rich leadership qualities