***Tang Weixiong Gerard***

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***Date of birth: 8 January 1991***

***Nationality: Singaporean***

***Race: Chinese***

***Gender: Male***

***Career Objectives: A young and aspiring degree holder who wants to strike out a career in the wealth management & administration industry with the determination to succeed, excel and to stand out from the rest.***

**Professional Experience:**

**UBS AG**

* Worked at UBS AG as an **Investment Reporting Analyst** from 16 January 2017 till now and able to start work within a month’s notice
* Responsible for producing tailor-made **Performance and Risk Reports** **and Multi Bank Reporting** for UHNWI, Family Offices as well as UBS mandate clients
* Present our **reporting capabilities** and **online tool** to clients and internal stake-holders and support the sales team
* First point of contact for **reporting related questions** for the Advance Reporting by **managing client’s expectations**
* **On-boarding** of new clients and setting up of tailor-made Performance and Risk Reporting
* Client servicing, answering queries, changing of the reports and attending **client review meetings**
* Managing the day to day tasks as well as the monthly production cycle by manually updating **3rd party transactions** in the reporting platform
* **Oversee** the calculation of the daily performance figures and **investigate** them on an accounts level

**United Overseas Bank (UOB)**

* Worked at UOB as a **Personal Banking Associate (PBA)** from 19 September to 30 November 2016
* Completed about one month of sales training for the requirement of the **PFS Personal Banking Development Program**
* Took steps to understand customers’ financial needs to provide them with **timely information, advice and recommendations** to fit their banking requirements
* Apply diligence and integrity to ensure proper advisory procedures and meticulous documentation in compliance with the Bank’s internal policies and regulatory requirements
* Utilise a combination of the Bank’s branch network, **Customer relationship management (CRM)** and referrals to meet individual sales targets
* Possess **CMFAS** certification such as **M5, M9 and HI**

**Fullerton Fund Management (Temasek Holdings)**

* Worked at **Fullerton Fund Management** as a portfolio services associate on a 5 months contract from 17 August 2015 to 15 January 2016
* Perform **cash reconciliation, bi-monthly & monthly position holding reconciliation to** ensure breaks are **investigated** and **resolved** in a timely manner by liaising with the custodian bank
* Prepare and deliver **Net Asset Valuation (NAV)** report for the mutual funds to the fund managers on a daily basis and to attend to their queries pertaining to the fund
* Did **valuation analysis** by reviewing **price variances** of the equities & bonds within the funds by verifying with the Bloomberg Terminal
* Process the various **fund invoices** for the **administration** of the funds such as taxation and management fees on a monthly basis

**The Hong Kong and Shanghai Banking Corporation (HSBC)**

* Intern at **HSBC Institutional Trust Services** as a junior **fund accountant** from 22 February 2010 to 30 April 2010 as part of the Industrial Placement Programme
* Churning out of reports from the **IMS (Investment Management System)** and checking all figures for irregularities
* Extracting all relevant **corporate actions** ranging from dividends, coupons, stock split, rights issue from the Bloomberg Terminal
* Reporting the updated **NAV** to client daily, weekly, monthly or annually depending on the types of funds

**Educational Qualifications:**

***Degree Studies***

* Graduated from Singapore Institute of Management (SIM) with an external degree from **University Of London** (UOL) with a degree in **Banking & Financial Services**
* Period of degree studies from June 2013 to June 2015
* Modules taken include Principles of Accounting, Corporate finance, Investment Management, Financial Intermediation and Auditing & Assurance

***Diploma Studies***

* Studied at **Nanyang Polytechnic** from April 2008 to April 2011 and having obtained a diploma in **Banking & Financial Services** specialising in **Fund Management & Administration** in the final year with modules such as **Fund administration & accounting** and Global securities operations

***Secondary School***

* Attended Peicai Secondary School from 2004 to 2007 and attained a GCE “O” level certificate
* Was in the military band (played the trombone) and achieved a bronze award for the Singapore Youth Festival (SYF) in 2005 and 2007

**Other Skills:**

* Proficient in Microsoft Office Word, Excel, Access and PowerPoint
* Had experience using Bloomberg Terminal
* Attained CMFAS certification such as M5, M9 and HI