

# ANGELINA YAP CHARTERED MCSI – PROFILE

---

A highly experienced international Asian banker and a Chinese market pioneer with a successful track record in the development and implementation of Asian business and marketing strategies for HNW private and institutional (financial and corporate) clients. A leading industry practitioner in offshore wealth management and private banking with broad international banking and marketing experience at top U.S., U.K. and Swiss financial institutions for over 20 years.

Performed controlled and governance functions for over twenty five years in the financial and banking sector as an FCA (Financial Conduct Authority) approved person with a controlled function for 12 years in the UK, as well as FINRA (Financial Industry Regulatory Authority, formerly NASD – National Association of Securities Dealers) registered and approved person for 15 years in the U.S.; Solid understanding of UK financial regulations, investment risk management and oversight.

Proxy board experience as a senior member of risk and investment committees at HSBC and Standard Chartered, with direct reporting lines to CEOs.

Well-established intermediary network in London, New York, Hong Kong, Shanghai and Singapore. Strong proponent of ESG forming a key component of any portfolio investment strategy, which also includes marine conservation. Active volunteer with British Red Cross and Marine Conservation Society.

My international banking experience, foreign language skills and multicultural heritage makes me uniquely qualified to be a key member on and contributor to boards that are looking to embed diversity and inclusion and build successful international business and marketing strategies.

A Chartered Member (MCSI) of the Chartered Institute of Securities Investments (CISI) UK, and an active and long-serving volunteer of British Red Cross and Marine Conservation Society.

## EXECUTIVE EXPERIENCE

**FairFX PLC, London, APAC Marketing Strategist** 2019 – Present

- Responsible for leading and implementing the APAC Marketing Strategic Initiative for FairFX (soon to be Equals), providing international FX and payment solutions to HNW, corporate and institutional clients from APAC including Greater China and key Southeast Asian markets.

**CH Investment Management, London, Client Director (Asia Pacific)** 2014 – 2019

- Led and developed new business initiative to serve UHNW Chinese diaspora from Asia Pacific including China, Hong Kong, Singapore which resulted in CH gaining top recognition by leading sector intermediaries in London. Created, developed and implemented brand and marketing strategy for CH Tier 1 Investor Service. Reported directly to Board Director and presented to CH Board on quarterly basis.
- Achieved and exceeded given net new assets in the first year. Successfully positioned CH to be the provider of choice and centre of excellence in delivering best in class investment solutions to this niche segment.

**Royal Bank of Canada, London, Director (East Asia)** 2013 – 2013

- Led and developed new business initiative to serve UHNW Chinese from East Asia including China and Southeast Asia. Direct reporting line to MD.

**EFG Private Bank, London, Director & Private Banker (Asia)** 2012 – 2013

- Developed and acquired HNW RND/NRND client relationships primarily from China, Hong Kong, and SE Asia and delivered best in class wealth management and credit solutions focused on UKVI's Tier 1 Investor Visa programme. Direct reporting line to MD.

**Standard Chartered Bank, London, Director & Head of Global Chinese** 2009 – 2012

- Initiated, designed and successfully implemented the UK Border Agency's Tier 1 Investor Programme Initiative for UK Private Bank. Launched programme to internal PB stakeholders in Greater China, Hong Kong and Singapore. Successfully developed the Chinese and SE Asian HNW / UHNW RND and NRND segments.
- Key member of New Client Committee and Functional Operations Risk Group (FORG) which oversees on-boarding new client and AML risk management procedures.

- HSBC Global Asset Management, Director & Head of Business Development Asia** 2007 – 2009
- Led and developed new business development in Asia for HSBC Global Asset Management (International).
  - Initiated, developed and successfully implemented strategic marketing initiatives and campaigns to increase funds under management for Group.
  - Member of Investment Executive Committee. Acted as product liaison with Group clients including Global Asset Management, Private Bank, International Trustee, International Wealth Management in Hong Kong and Singapore. Direct reporting line to CIO and CEO in London and Jersey.

- Merrill Lynch International Private Client, New York, VP & Financial Consultant** 2005 – 2007
- Key member of APAC Complex headquartered in San Francisco with direct reporting line to Head of International Private Client Merrill Lynch Singapore. Developed and managed HNW/UHNW clients originating from U.S., Canada, Hong Kong, Singapore and Philippines.

## EARLY CAREER

- HSBC International Private Bank, New York, Vice President** 1999 – 2005

### *Relationship Manager/Private Banker*

- Provided discretionary and advisory investment solutions to key clients. Developed new business and markets targeting HNW Asian clients from U.S., Hong Kong, SE Asia, Canada, and Europe.
- Investment specialist: Provided investment advice and solutions to team members on value-added investment strategies for team's UHNW clients with focus on increasing group's ROP.

### *Project/Product Manager*

- Project/Product Manager for HSBC Investment Management Discretionary Services (HIMDS). Led, designed and implemented HIMDS initiative project to NY IPB. Developed the marketing process and successfully delivered the value proposition of UK's HAM new discretionary investment service to HSBC PB's North and South Americas' key markets - *New York, Los Angeles, Miami, Sao Paulo, and Buenos Aires*. Key member of New Business Development team: Key member of new Private Banking marketing initiative to develop HNW ethnic Chinese market. Made significant contributions to HSBC's market leadership.

- UBS Securities LLC, New York, Vice President, Fixed Income Institutional Sales (Asia)** 1996 – 1998
- Developed and managed East Asian (Yankee) financial institutional relationships and positioned UBS to be leading distributor of fixed income debt (primary and secondary) to major banks from S. Korea, Taiwan, Indonesia and Malaysia. Cross sold fixed income credit products underwritten by UBS New York, London, Singapore.

- Merrill Lynch, New York, Vice President, Fixed Income Institutional Sales (Asian Banks)** 1993 - 1996
- Successfully developed East Asian financial institutional relationships and positioned Merrill to be the leading distributor of fixed income debt to financial institutions (including Central Banks) from S. Korea, Taiwan, Indonesia and Malaysia. Market pioneer in developing Indonesian banks' distribution network for MLFI.

## DIRECTOR QUALIFICATIONS

- School of Engineering and Applied Sciences, Columbia University, New York, M.Sc., Operations Research
- Barnard College, Columbia University, New York, B.A., Economics

## CERTIFICATIONS, LANGUAGE SKILLS, VOLUNTEERING, NETWORKS

- Investment Advice Diploma (IAD) in Securities (Level 4) CISI (UK); Investment Management Certificate (IMC), Units 1-2 (Level 4), CFA Society UK
- Series 7 (General Securities Representative) / Series 63 (Uniform Securities State Agent State Law)
- Honours & Awards: Chartered Member (MCSI) CISI UK
- Foreign Languages: Proficient in four Chinese dialects; Conversational Japanese.
- Active volunteer at British Red Cross as EFA, ER, First Aid Education Trainer / Instructor
- Member of Marine Conservation Society and Beachwatch Organiser
- CELTA Graduate (Certificate in Teaching English to Speakers of Other Languages)