

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. Broad international private banking and marketing experience of over twenty years (managing HNW families from 8 international markets), my multicultural heritage makes me uniquely qualified to be a key participant on and contributor to organisations that are seeking to embed diversity and inclusion to build successful international business and marketing strategies.

Performed controlled and governance functions for twenty seven 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.; a Chartered Member (MCSI) of Chartered Institute for Securities & Investment (CISI) in the U.K. Solid understanding of UK financial regulations, investment risk management and oversight.

Well-established intermediary network in London, New York, Hong Kong, Shanghai and Singapore and a leading industry practitioner in offshore wealth management and private banking for over 20 years. Strong proponent of and passionate about 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.

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 SE 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.

Standard Chartered Bank, London, Director & Head of Global Chinese 2009 – 2013

- 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 (1993-2005)

- **HSBC International Private Bank, New York**, Vice President *Private Banker / Project-Manager*
- **UBS Securities LLC, New York**, Vice President, Fixed Income Institutional Sales (Asia)
- **Merrill Lynch, New York**, Vice President, Fixed Income Institutional Sales (Asian Banks)

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

- Honours & Awards: Chartered Member (MCSI) CISI UK
- 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)
- CELTA Graduate (Certificate in Teaching English to Speakers of Other Languages)
- Foreign Languages: Proficient in four Chinese dialects (Mandarin, Cantonese, Fukien, Shanghainese); Conversational Japanese.

VOLUNTEER AND CHARITY EXPERIENCE

- British Red Cross, Emergency Responder (Present)
- British Red Cross, Event First Aid Volunteer and Officer (2014-2019)
- New York Red Cross, First Aid Instructor (2001-2007)
- Fund raiser and corporate sponsor for World Horse Welfare (2015-2019)
- Member of Marine Conservation Society and Beachwatch Organiser (Present)
- Support various causes and charity organisations including Age UK, American Red Cross, British Red Cross, Great Ormond Street Hospital, MacMillan Cancer Support, Marine Conservation Society, Susan Komen Breast Cancer Foundation (New York), RSPCA, World Wildlife Fund.