

## ▶RIHANNA TO

rihanna.to@gmail.com

9123 2025

### SUMMARY

Talented wealth management consultant with exceptional understanding of a wide range of investment vehicles, including equities, structured products, foreign exchanges, and derivatives. Demonstrated track record in developing profitable relationships with high net worth individuals.

### AREAS OF EXPERTISE

- ▶ Account Management
- ▶ Client Acquisition
- ▶ Financial Management
- ▶ Portfolio Optimisation
- ▶ Revenue Enhancement
- ▶ Risk Management

### EXPERIENCE

#### **Financial Planner, KIP International Ltd.**

Jun 2012 - Present

- ▶ Provided investment, savings, and liability management solutions to help develop financial strategies for 50+ clients with assets from \$500K-\$800K+
- ▶ Assisted top management to identify competitive gaps, service issues, business opportunities, and challenges to share with 100+ stakeholders
- ▶ Explored referral opportunities to other business streams, especially investment opportunities to partnered managers to generate additional business

### KEY ACHIEVEMENTS

- ▶ Secured 50+ new accounts and increased division's revenue by 15% in 2013 and 2014 respectively
- ▶ Led a team of 5 and ensured all processes and procedures were accurate and in accordance with the group compliance policy and regulatory requirements

### EDUCATION

#### **Chinese University of Hong Kong, 2009-2012**

Bachelor of Business Administration (Honours) in Global Economics and Finance

### COMPUTER SKILLS

Microsoft Office (Word, PowerPoint, Excel & Access)

### LANGUAGES

Cantonese (Native)    English (Proficient)    Mandarin (Proficient)    Spanish (Basic)