

## DAVIS CHAN

**SUMMARY** High-impact and action-driven professional with 2+ years of experience in offering consulting services for corporate or individual financial growth with management strategies to evaluate or capture investment and cost improvement opportunities.

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**EXPERIENCE** **Wealth Management Consultant, JC Financial Group Ltd.**

Jun 2012 - Present

- Managed 50+ diversified portfolios that utilised the database system of prospective clients to help increase their firms' market shares
- Brainstormed with concrete records in strategic planning for 20+ clients' sales of their services and products on a regular basis
- Analysed 20+ individuals' financial directions in budgeting, cash flow solutions, current portfolios, asset allocations and planning strategies
- Partnered with about 30 medium-scaled business owners annually to institute tax savings methodologies to maximise net profit

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**ACHIEVEMENTS**

- Worked with individual and small business clients across four offices, generating over \$600K in annual revenue
- Managed book of business for over 65 clients with more than \$50 million in assets under management
- Oversaw a team of financial advisors, consistently earning recognition as top 10% of performers organisation-wide

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**EDUCATION** **Hong Kong University of Science and Technology, 2009-2012**  
Bachelor of Business Administration (Honours) in Operations Management

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**SKILLS** Microsoft Office (Word, PowerPoint, Excel & Access)

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**LANGUAGES** Cantonese (Native) | English (Proficient) | Mandarin (Proficient)

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**AVAILABILITY** One month's notice

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