

Sophomore/Second Year Student

LEUNG, Wing Nam (Heather)

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EDUCATION

- 2021 – 2025 **The Hong Kong University of Science and Technology, Hong Kong**
BBA in Global Business; Full Admissions Scholarship; CGA: ██████ obtained as a former BSc in Quantitative Finance
- 2022 – 2023 **Yonsei University**, Winter Exchange
Econometrics I; Grade: A+; Percentage Grade: 96%
- 2015 – 2021 **Dulwich College Beijing, Beijing**
10A*'s 2A's at iGCSE; 44/45 at International Baccalaureate (Exam Route)

EXPERIENCE

- Jan 2023 **Privé Technologies**, Strategy Analyst Intern
- Conducted market analysis on trends and opportunities in the APEC Wealth Management landscape
 - Built appropriate external and internal client-facing materials assessing Hong Kong's B2B PWM landscape and investment case for horizontal expansion into B2C solutions
 - Provided and communicated strategies to address competition, changes in client preference, and improvements in technology and marketing tools
- Jun 2022 – Aug 2022 **Generali Hong Kong**, Insurance Claims (Operations) Intern
- Supported executives and team of 15 in UAT and UI copywriting for mobile app development
 - Processed claims in English and Chinese (Traditional and Simplified) through judgement-oriented evaluation of client documentation against respective policy specifications
 - Applied intelligent decision enabled technology to identify possible fraudulent claims

EXTRA-CURRICULAR ACTIVITIES

- Oct 2022 – Jan 2023 **Investment Circle @HKUST**, Head of External Affairs
- Successfully outreached and secured 16 various industry professionals to serve as career mentors
 - Coordinated events for 300+ members in collaboration with partner firms AmplifyME and Flow Traders
 - Initiated new partnerships with student organisations Traders @UST and LSE's Asia Investment & Banking Conference
- Sept 2022 – Feb 2023 **180 Degrees Consulting**, Non Profit Consultant – HKUST Branch
- Performed market research and cost analysis on the Singaporean disability employment landscape
 - Synthesised, refined and presented research findings and insights with Bocconi branch consultants
- Sept 2022 – present **Dawn Advisory**, Vice President External Affairs – HKUST Branch
- New client acquisition, project management, recruiting
- Mar 2022 – present **Dawn Advisory**, Strategy Consultant – HKUST Branch
- Delivered impact-driven recommendations to start-ups in InsurTech
- market research · collaboration · creative problem solving · time management · adaptability*
- Apr 2022 – present **The MergerSight Group**, Research Analyst – HKUST Chapter
- Provided high quality coverage of M&A activity through co-authored, concise reports
- market research · collaboration · analytical reasoning · written communication*

AWARDS/HONORS/CERTIFICATIONS

Awards

- CGMA Global Business Challenge 2022 National Runner-up (May 2022)
- iGCSE English World Literature Top in China (2019)

Certifications

- University of Michigan | Coursera: Python Data Structures, Using Python to Access Web Data
- Macquarie University | Coursera: Excel Fundamentals for Data Analysis
- LinkedIn Learning: Learning VBA in Excel
- Bloomberg Professional Services | Bloomberg Market Concepts

PERSONAL

- Languages: English (Native), Mandarin (Native), Cantonese (Native), Spanish (Basic)
- Computer Skills: MS Word, MS PowerPoint, MS Excel VBA, MS Access, Python (Basic), Adobe Acrobat
- Hobbies: Skiing, hiking, weightlifting, blogging (imheatherr.com); monetised with 862,000+ visits)

Global Client Group, Summer Intern, Based in Hong Kong

📍 Central, Hong Kong

🏢 Other

🏠 R230100616

SAVE JOB

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Nuveen is the investment management arm of TIAA. It is one of the largest global asset managers with specialist knowledge across a wide array of asset classes, including fixed income, equities and alternatives. Nuveen is driven not only by the independent investment processes across the firm, but also the insights, risk management, analytics and other tools and resources a truly world-class platform provides. As a global asset manager, our mission is to work in partnership with our clients to create outcome-focused solutions to help them secure their financial future. For more information about the firm please visit our website at www.Nuveen.com

What sets us apart?

- **A heritage of excellence** - Proven performance across a wide range of portfolio offerings since 1898
- **Global scale** - Recognised as one of the largest investment managers in the world with specialist expertise around the globe
- **Investing alongside our clients** - Investing materially alongside our clients ensures strong alignment with their interests
- **Financial stability with long-term focus** - Private ownership under TIAA expands our scale and resources while reinforcing long-term investment objectives

Overview of the Department

Global Client Group covers Distribution, Consultant Relations, Relationship Management, Client Servicing, and Learning & Development, and aims to deliver a 'One Nuveen' experience to our global client base. Global Client Group is focused on establishing new relationships within the Institutional and Wealth channels while deepening relationships with existing clients. Nuveen targets the largest sources of investment capital around the world. Our team is global, with in-market presence in the Americas, Europe, and Asia Pacific regions

The intern will have the opportunity to:

- Understand the distribution team's territory management and sales strategy overview
- Be involved in product pitches and client review calls; identify and compile necessary follow-up items
- To maintain and review our customer relationship management (CRM) system including daily activity upkeep and participating in projects to improve data quality
- Support the team ad-hoc on various client related tasks and projects.

What this program will offer you

- A 10-week summer program, where you will participate in a robust training curriculum, attend company functions, including speaker series, lunch-and-learns and social networking events that will offer the opportunity for career growth and personal development.
- Ability to gain hands on experience as well as getting an overall feel for the firm/ industry by attending business meetings, delivering presentations, exploring business-specific tasks, contributing to projects, and working closely with cross-functional groups
- Exposure to Senior Business Leaders globally across Nuveen and TIAA
- An option to secure a permanent role after graduation

What skills & competencies we require:

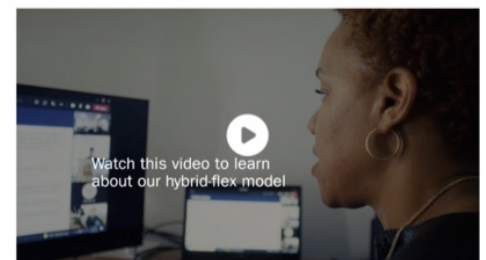
- Penultimate Year undergraduate on track to attain a GPA 3.3 (or the equivalent of a 2.1 from a recognised University)
- A demonstrated passion for Sales and Investment Management
- Examples of professional & personal commitment to excellence
- Excellent interpersonal skills
- Team player
- A strategic approach, sound business judgment and an entrepreneurial mind-set
- Must be competent with Microsoft Office (Word, Excel, PowerPoint & Outlook)
- Financial modelling experience is desirable
- Be fluent in English, however, for the Hong Kong programme, knowledge of Mandarin and/or Cantonese would be an advantage.

The application deadline is on 20 February 2023

Due to high volume of applications

- We will only consider students in their penultimate year graduating in **2024**
- We will only consider applicants who have the right to live and work in the country for where the internship is located
- You must be able to work the internship dates of **26th June - 31st August 2023**

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