

Alex Chan

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Highlight of Profile

- Investment and Finance Professional with over **13 years M&A, Strategic Investment, Corporate Development and Financial Planning experience**
- Professional credentials in **CPA and FRM**
- Solid knowledge of **insurance asset management, distribution, finance, ALM and capital management**
- **International** working experience (based in **Hong Kong**; worked abroad in **Shanghai, Zurich and New York**)
- Exposure to **SEA and Greater China as well as developed markets in North Asia**

Professional Experience

Generali Asia Office, M&A and Strategy, Greater China and ASEAN, Oct 2018 to Present

Part of the Asia CEO office for Insurance business - responsible in collaboration with Generali head office, business leaders and country management to drive profitable and sustainable growth in Asia by originating and executing M&A transactions; fostering distribution alliances; crafting ecosystems partnerships; and curating impactful and executable business strategies; supporting Group M&A and Asset Management team on the selective asset management opportunities and market study in Asia

Key M&A and partnership achievements:

2023: Vietnam: Executed a strategic and exclusive Bancassurance partnership with National Citizen Bank

2021-2023: Malaysia - Generali signed agreement to acquire majority stake in AXA Affin Joint Ventures and purchased 100% of MPI Generali; transactions closed in 2023

2019: Vietnam: Executed 15-year Exclusive Bancassurance partnership with Orient Commercial Bank and reviewed various bancassurance opportunities in the market

Reviewed various M&A and bancassurance opportunities in Asia

China Everbright Limited (Hong Kong), Investment Director, Strategic Investment, Jan 2018 to Oct 2018

Chinese SOE Everbright Group's asset management platform based in Hong Kong. The platform manages more than USD 10bn AUM covering overseas multi investment strategies and asset classes (outside China). Reported to Chief Strategy Officer and led strategic investment team focusing on group M&A and strategic investments to identify insurance asset management and alternative asset management platform

Responsibilities:

- Led deal sourcing process and created formalized pre and post deal process including due diligence, approval requirements, transaction documentation and integration of work streams

Key M&A and partnership achievements:

- Evaluated life insurance investment opportunities in Hong Kong and China
- Executed a third-party insurance asset management mandate with a Chinese based insurer in Hong Kong
- Evaluated a leading wealth management company investment opportunity in China

Swiss Reinsurance, Investment Professional, Principal Investments and Acquisitions (Hong Kong & New York), Jun 2011 to Dec 2017

Principal Investments as part of Swiss Re's Group Strategy function, manages a portfolio of direct equity investment in financial services and healthcare space (both listed and unlisted) and is also responsible for Swiss Re Group's M&A activities including venture investment in InsurTech and HealthTech. Reported to head of PIA

Key Strategic Minority and M&A Achievements:

2017: China - Executed partial exit in New China Life Insurance

2016: US - Identified and executed full exit in a legacy investment quoted on OTCQB

2015: Japan - Executed full exit in a co-investment for a leading retail bank in Japan

2014: China - Executed 100% acquisition of Sun Alliance Insurance China (rebranded Swiss Re Corporate Solutions Insurance China)

2013: Asia - Supported execution of strategic investment in FWD in partnership with Pacific Century Group

2013: China - Executed a minority strategic investment in New China Life Insurance

2012: China - Executed a minority strategic investment in Alltrust Insurance

Participated in various Group M&A projects in Americas and Europe

Monitored portfolio companies including assisting board members for board meeting matters and liaison with board office

Two rotation experience: Assigned to Group Capital Management and Finance team in headquarter of Zurich in 2014 and Principal Investments Americas team in New York City in 2016

TR Advisors, Investment Analyst (Hong Kong & Shanghai), Private Equity, Jun 2010 to Jun 2011

TR Group (www.tr-capital.com) is an Asian private equity investment firm investing in various Private Equity funds (through primary and secondary operations) and direct co-investments. TR has a strong partnership with French DFI Proparco and a global asset manager Tikehau Capital. Reported to CEO

Executed Transaction Experience:

- Executed a secondary purchase of LP stake in a leading Chinese private equity fund
- Executed FoF investments in Asian based private equity funds

Sourced, analyzed and prioritized pipelines and involved in all investment stages from initial analysis to execution to monitoring

Deloitte, Associate (Hong Kong), Financial Advisory, Sep 2008 to Jun 2010

Supported execution of restructuring projects, due diligence engagements in China (including Hong Kong) and distressed debt advisory services

Principal Financial Group, Summer Intern (Hong Kong), Jul 2007 to Aug 2007

Intern placement as part of the scholarship program. Worked in Equity research to support PMs

Shanghai AJ Trust & Investment Co Ltd, Summer Intern (Shanghai), Jul 2006

Intern placement

Education

- **MIB Trieste**, Master in Risk Management and Insurance, Oct 2022 – July 2024 (Generali sponsorship)
- **Hong Kong University of Science and Technology (HKUST)**, BBA, Finance and Economics, Sept 2005 – June 2008
- **SKEMA Business School, France**, Fall Semester 2007/08, International Exchange Program
- **The Massachusetts Institute of Technology (MIT)**, 2016, Executive Education (MIT Cambridge campus)

Awards & Professional Accreditations

- **Financial Risk Manager (FRM)**
- **Member of Hong Kong Institute of Certified Public Accountant (HKICPA)**
- **Hong Kong Securities Institute (HKSI) Scholarship Junior Award - 2007**
- **Principal Financial Group Scholarship Award – 2007**
- **Former SFC license Type 9 Representative (Asset management)**
- **Completed CFA Level II**

Language

- Native speaker of **Cantonese** and **Shanghainese**. Fluent in **English** and **Mandarin**