

JEN LIANG, CFA

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Forbes 30 Under 30 listed entrepreneurial executive and strategic investor with proven success founding innovative ventures with profitable exits, building business, managing complex risks, growing multibillion-dollar funds, fostering relationships, and leading collaborative teams. Results-driven thought leader and trusted advisor who leverages analytical skills and an extensive network to define top-performing strategies. US Citizen.

PROFESSIONAL EXPERIENCE

WISP San Francisco, CA (Remote)
\$80M ARR High Growth Health Tech majority owned by WELL Health Technologies (TSX: WELL)

Chief of Staff April 2023 – October 2023

The CEO's advisor and extension in all aspects of the business driving strategic initiatives, fostering cross-functional collaboration, and optimizing organizational efficiency for IPO readiness.

- Enhance financial models and a data-driven framework to improve forecasting and capital efficiency.
- Collaborate cross-functionally to define and align OKR goals, strategic objectives and milestones.
- Supported the navigation of a supply chain disrupting incident, salvaging 80% of revenue-at-risk.

AIG INVESTMENTS (NYSE: AIG) New York, NY
\$350B AUM global investment manager serving institutional and family office clients

Vice President, Portfolio Manager September 2018 – January 2023

Co-managed \$13 Billion multi-strategy Emerging Markets fixed income portfolios. Improved analytics for attribution, predictive and risk modeling, and capital allocation. Built up a team from 5 to 14. Fund sold to BlackRock.

- Consistently outperformed and ranked in top 10% of peer group on eVestment throughout tenure.
- Actively contributed to marketing efforts and onboarded new clients, adding over \$2B new deals.
- Created new investment policies, research processes and infrastructure incorporating ESG.

Vice President, Senior Research Analyst February 2018 – September 2018

Lead analyst on Consumer and Industrials sectors. Managed relationships with 40+ portfolio companies.

- Analyzed companies and financials to generate investment ideas that outperformed 73% of the time.
- Grew research coverage by over 30% and deployed capital of \$900M total market value.

Associate, Senior Research Analyst June 2017 – February 2018
Same responsibilities as above.

FOSUN GROUP New York, NY
Conglomerate, investment company and family office with \$120B across Consumer, Healthcare and Real Estate

Manager, Global Investment Strategies February 2016 – May 2017

Early employee of the US arm. Built the venture capital business. Presented to LPs and GPs.

- Led a team of 4 to complete 6 transactions totaling \$20M, from due diligence to negotiations to surveillance.
- Delivered \$24M ROI, 4 exits averaging 8x returns, and \$200M portfolio valuation growth.

ALLIANCEBERNSTEIN (NYSE: AB) New York, NY
Banking, securities, and investment management firm and leader in research and ESG strategies

Associate January 2014 – January 2016

Selected for exclusive rotational program with assignments in Fixed Income, Emerging Markets, and Real Estate.

- Conducted research on companies and industries by building financial models with metrics and forecasts.
- Oversaw two U.S. high-yield portfolios, executed strategies, and assessed risk and return.

EDUCATION

GRINNELL COLLEGE

Grinnell, IA

Prestigious private liberal arts college (U.S. News National Ranking #11)

Bachelor of Arts in Economics

2010 – 2013

- Honors: Trustee Honor Scholarship; Dean's List; James J. Hill Circle Recognition
- Internships: TIAA-CREF; NYC Mayor's Office; U.S. Securities & Exchange Commission

CERTIFICATIONS

Chartered Financial Analyst | Certificate in ESG Investing, CFA Institute
500-Hour Certified Yoga Teacher, Siddhi Yoga in Rishikesh, India

ADVISORY & FOUNDER EXPERIENCE

Co-founder & COO, Haulsale.com (Techstars-backed, sustainable wholesale and resale online marketplace)
Founder, Wunderbar Health (D2C vegan protein bars with \$300k MRR. Exited in 2017)
Mentor, Techstars (top-tier global venture accelerator, network and investor)
Advisory Board Member, Risk.net (in-depth news and analysis on risk management, derivatives and regulation)
Capital Markets Consulting Instructor, Wall Street Prep (leading financial training firm for investment banks)

TECHNICAL SKILLS

Microsoft Excel | Bloomberg | Python | Looker | MarketAxess | CapIQ | Aladdin

LANGUAGES

English (Native) | Mandarin (Fluent) | German (Intermediate)