

Bee G. Lim, CFA, CAIA 林美娥

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+1-762-233-4546

BeeLim.com

*Strong background in direct credit and equity investing.
Extensive hedge fund manager research experience.
Asia connections. Team leader, team player.*

Wurts & Associates

Seattle, WA

Associate Director of Research

Jan 2010–Nov 2010

Head of manager research group covering both traditional and alternative asset classes including equities, fixed income, credit, hedge funds, private equity and real estate. Interviewed 150+ managers and conducted domestic equities, fixed income, mezzanine and distressed searches on behalf of clients.

Sat on Research Advisory Committee and worked with the Director of Research in formation of macroeconomic views and portfolio management advice to clients with \$30bn assets under advisement.

SAIL Advisors / Search Investment Group

Hong Kong & Seattle, WA

Executive Director, Head of Relative Value Research

2004–2008

Head of Manager Research: Directed non-equity hedge fund strategies including relative value, credit/distressed, emerging markets, and macro/CTA for \$2bn global and \$450m Asia-focused hedge fund portfolios. Personally responsible for 60% of the capital invested. Interviewed 350+ managers globally and actively followed over 50 invested and “high potential” hedge funds. Supervised a team of three analysts while reporting directly to the CIO.

Executive Team: Partnered with the CIO to determine asset and strategy allocation targets for the portfolios. Sat on a five-person Investment Committee formed to approve all investment and divestment recommendations presented by analysts.

Risk Oversight: Spearheaded the portfolio risk measurement project to track exposures and leverage for internal and client use.

Built Process and Systems: Formulated a formal research process (including a manager ranking system) and implemented a data management system needed to conduct thorough due diligence on hedge funds.

Managed Growth: Involved in the transition from a private family office (Search) to an institutionalized fund of hedge funds (SAIL) by hiring analysts, crafting business plans, preparing investor presentations, conducting educational sessions for and meeting with potential investors. Helped grow third party assets to \$1bn.

Vice President, Senior Hedge Fund Analyst

2001–2003

Part of a three-person team managing the global hedge fund portfolio of Search Investment Group, the family office for Robert Miller. Spearheaded move from equity strategy to macro/CTA managers which resulted in positive portfolio performance in 2002.

Covered all strategies including equity long/short, event driven, relative value, credit/distressed, emerging markets and macro/CTA as a generalist.

Key Points

16 years research and investment experience

including hedge funds, credit, convertibles and equities in the US and Asia

7 years at a global fund of hedge funds

in Hong Kong with \$2.5bn under management

Led team responsible for over **\$1bn** of hedge fund investments

Yale; CFA, CAIA

Fluent in English, Mandarin, Cantonese, Taiwanese/Hokkien. Intermediate knowledge of French, Japanese, Malay.

Education & Professional Qualifications

Yale University, 1992
New Haven, CT.

B.A. cum laude, Economics and Mathematics.

Chartered Financial Analyst, 1995

Chartered Alternative Investment Analyst, 2005

Sitting for level II of the **Financial Risk Manager** exam, 2011

Contact

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Downloads

Download a vCard with all contact details at:

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Bankers Trust Company / Deutsche Bank Limited *Hong Kong*

Vice President, Finance Capital Management Group 1997–1999

One of a three-person team responsible for Asian investments of a global credit portfolio, with over US\$300m invested in the region.

Was a generalist responsible for analysis and trading of high-yield bonds, convertibles and stocks in the ASEAN and Greater China markets. Formulated hedging strategy using derivative products as part of the portfolio management process.

Paribas Asia Equity Limited *Hong Kong*

Manager, Equity Analyst 1996–1997

Utility and infrastructure sell-side analyst responsible for the Hong Kong/ China markets, with full coverage of about 15 companies. Maintained close contacts with company management, made financial forecasts, published research reports, and updated buy-side fund managers on any new developments at the companies and/or changes in stock recommendations.

Kingdon Capital Management Corporation *New York, NY*

Financial Analyst 1994–1996

Hedge fund equity analyst working with the Asia-Pacific portfolio manager, responsible for investment recommendations in the Southeast Asian countries. Researched several macro projects, including studies on the characteristics of various Asian stock indices and the correlation between liquidity flows, closed-end fund premiums and movements in the equity markets.

Nomura Corporate Research & Asset Mgmt *New York, NY*

Associate, Credit Analyst 1992–1994

U.S. high yield fixed income analyst responsible for investments in the energy, utility, chemical and supermarket industries. Promoted to Associate after two years in the analyst program.

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page 2

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