PROFILE OF ANN LEE

Wealth Advisory | Financial Planning
HNW Client Management

Ann Lee

Financial Advisor

Synergy Wealth Management

Singapore | English & Mandarin



CAREER MILESTONES

- 8+ years in financial planning and wealth advisory for affluent, HNW and UHNW clients across insurance, banking and private client advisory
- **Synergy Wealth Management** – Financial Advisor
- **Henley & Partners** (Manager, Private Client Advisor): converted 70% of qualified UHNW prospects into advisory relationships
- **Chubb** (Accounts Executive & Risk Advisor): identified SGD 2.5M+ in cross-sell opportunities across 30+ corporate clients
- **HSBC** (Premier Business Development Manager): exceeded sales targets by 115–130%; acquired 80+ Premier and Jade clients
- **Aviva** (Financial Consultant & Wealth Advisor): Top 10 in division with a 75% meeting-to-close conversion rate

QUALIFICATIONS

- CMFAS: M5, M8, M8A, M9, M9A, RES5, HI, BCI, PGI, ComGI
- Singapore College of Insurance (SCI), 2017
- Bachelor's Degrees, Fu Jen Catholic University

SPECIALIZATIONS

- Retirement Planning
- Estate Planning & Structuring
- Investment Advisory
- Risk Management & Income Protection
- Tax-efficient Wealth Strategies
- Group Benefits for Corporate Clients

PERSONAL PHILOSOPHY

- Client-Centric, Needs-Based Advice
- Integrity and Regulatory Compliance
- Long-Term, Trusted Relationships