

John Yang, AIFA®

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Investment Advisory/Wealth Management Services

Principal and Investment Advisor of PACRIM Investment Services, a state registered RIA founded in 3Q 2012. Investment Advisory sales, prior to 2012 with several corporate RIA's: Chinatrust, U.S.A., East West Bank United Commercial Bank, WHJR Associates, Inc. (Royal Alliance Associates), John Hancock Financial, and SMA Advisory Services.

Basic responsibilities and duties based on meeting and exceeding targets and performance metrics in several key areas including:

- Fee Based Services
- Transaction/Brokerage Services
- Recruiting
- Training
- Sales support to Registered Representatives

Executive Search & Business Consultant

Prior to becoming an Investment Advisor I was an

- Executive Recruiter for Boyden in Taiwan and Hong Kong, and later with Montgomery Professionals in San Francisco. Before that I was a
- Business Consultant for Investec Taiwan Limited working with multinational companies doing business in Taiwan.

Job Placement and Social Work

Before entering the private sector, I did social work in the bay area community. Key areas of services include:

- Developing jobs for entry level immigrants and refugees
- Packaging Small Business Administration Loans for minority businesses
- Generate new projects by research and responding to RFP's (request for proposals)

Education:

- Graduate Degree, Masters in Public Affairs (MPA), Woodrow Wilson School of Public and International Affairs, Princeton University,
- Bachelor of Arts (BA), Communication and Public Policy, University of California, Berkeley.

Certifications and Licenses:

- FINRA, Series 7, Series 66, Series 24, Life & Health & Property and Casualty (License CA #0729853),
- Accredited Investment Fiduciary Analyst (10/18/2007); Accredited Investment Fiduciary Auditor (AIFA) 6/16/2004;
- Prior Certified Investment Management Analyst (CIMA), Investment Management Consultants Association/Wharton Business School, 3/13/1998.