



ZiASSET CONSULTING

Introducing China to the world and the world to China

What We Do

ZiAsset Consulting serves as a bridge into and out of China. We assist asset managers looking to access the Chinese market, establish operations in China, and reach Chinese investors. We provide Chinese asset managers with introductions to foreign investors and we help foreign investors looking to invest via Chinese asset managers. With over 120 years of combined experience, the ZiAsset Consulting team is ready to help you succeed.



Who We Serve

ZiAsset Consulting focuses on helping investment management firms, financial services companies, and investors. We partner with clients to achieve their goals and maximize the opportunity for their success. We provide strategic business consulting and customized technology solutions to serve the international and Chinese investment management, wealth management, pension, and securities services industry.

How We Are Different

- Unmatched local and Asia-Pacific network
- Deep and broad expertise and thought leadership in the industry
- Significant understanding of China and key Asia-Pacific financial markets, and their emerging opportunities and challenges
- Pioneers in working with financial institutions and supervisory bodies to establish businesses in China
- Long-standing working relationships with the key supervisory bodies and industry associations in China



Shanghai | Hong Kong | Switzerland | United States

ZiAssetConsulting.com

Services We Offer

Strategic Consulting

- Market entry analysis
- Market positioning
- Competitive benchmarking
- Client segment analysis (products & activities)
- Business plan preparation and execution support
- Strategy diagnosis (definition of vision, mission, objectives)
- Implementation of the Global Investment Performance Standards (GIPS®)
- Business partnership search and identification
- Due diligence and acquisition support
- Benchmarking against industry best practices

Technology Solutions

- Building and implementing technology solutions to enhance operational efficiency and effectiveness
- Designing and implementing systems to improve on:
 - Corporate governance
 - Enterprise risk management
 - Compliance controls
 - Reporting automation
 - Process re-engineering and optimization
 - Data center design and implementation



Who We Are



Chengsen Yeh, CFA
Founder & Managing Partner
Shanghai

Chengsen has more than 20 years of experience in local and international asset management, pension, custody, and management consulting. He was a partner at KPMG and director at EY. He led many important M&A transactions in the China financial industry and is renowned specialist in the custody industry. He pioneered SAS 70/ISAE 3402 internal control reporting and Global Investment Performance Standards in China. His clients include top Chinese and international commercial banks, insurance groups, securities companies and asset managers.



Lawrence Au
Co-Founder | Hong Kong

Lawrence has been at the forefront of Asia's financial industry for over 35 years since the industry's nascent development in the early 1980's. He was the APAC CEO for 16 years with the securities services business of BNP Paribas and Northern Trust and took the start-up platforms of the two banks off the ground to become a market leader in the region. In his last capacity as chief executive, he provided leadership to over 2,000 staff in 7 countries and 9 offices. He was presented Lifetime Achievement Award by Asia Asset Management in 2016 and has published a book "Asia's Financial Industry 1986-2016" in both English and Chinese. He has lived and worked in Hong Kong and Singapore for most part of his professional career.



Jonathan A. Boersma, CFA
Co-Founder | United States

Jonathan has over 25 years of experience in the financial services industry, most recently serving as the Executive Director of the Global Investment Performance Standards (GIPS) and the head of professional standards at CFA Institute. Jonathan is a globally recognized expert in investment performance, ethics, and the GIPS standards and testified before the United States Senate Judiciary Committee on the need for independence between investment analysts, hedge funds, and corporate issuers. Jonathan was the 2014 winner of the Portfolio Institutionell (www.portfolio-institutionell.de) Reader's Choice Award for Industry Achievement.



Roger H. Hartmann
Co-Founder | Switzerland

Roger is an experienced senior banker with over 35 years of banking experience, with strong exposure to wealth management strategy and leadership, particularly regarding the transformation of a post-financial crisis business model. Numerous experiences with Growth Strategies, development of new markets, hub strategies, M & A, transformation, cost reduction, as well as crisis management. He worked as a CEO of various banks from 1998 to 2014, mainly in Europe and in Asia. He spent 24 years at UBS, where he worked all over the world, and was also a partner at EY. Roger is also teaching at academic level since 1980. He is a visiting Professor at the Universities of Luxembourg and Liechtenstein.