

Calvin Tan

Capital Market Product Services Product Manager

Based in banking to onboard and deliver wealth-based solutions to priority clients in Wealth Management, currently managing Equities. All rounder in E2E propositions in projects starting with conceptualizing ideas and product into market delivery. Highly motivated and a fast learner, I am a creative thinker and can adapt to a changing environment very easily to meet business goals.



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SKILLS

Process Development

Fast Learner

Digital Transformation

Agile Methodologies

Marketing Strategy

Interpersonal Skills

Presentation Skills

Employee Training

Project Management

LANGUAGES

English
Native or Bilingual Proficiency

Mandarin
Professional Working Proficiency

Cantonese
Limited Working Proficiency

INTERESTS

Scuba Diving - Advanced
License Holder

Avid speaker - Club
President of MSALTU,
School Debating

WORK EXPERIENCE

CAPITAL MARKET PRODUCT SERVICES PRODUCT MANAGER

Standard Chartered Bank Malaysia

07/2020 - Present

Achievements/Tasks

- FX - Key stakeholder for market delivery of LiveFX with regulatory, collateral, training and marketing campaign push. Campaign has activated MYR20mil in transactions during its duration.
- Wealth Lending - Tool development and process automation for investment products for sales team usage. Developing an API, tightening tracking and automating processes increasing Wealth Lending activation in sales by up to 40%.
- Wealth Lending - Project lead for a cross-border initiative in enabling and developing a lending/deposit product. Managed an international working team to build the product within cross border guidelines. Product brought in SGD20mil for bank currency utilisation.
- Equities - E2E development of an Online Equity Platform & its journey for mobile and web. Conceptualized and developed an award winning on-boarding journey by improving it from 1 week to 5 minutes. Key member in the development and contextualization of the Online Equity to Malaysian requirements.
- Equities - Process/legal/BCP/Risk documentation of the platform, service team set-up with call center helplines, stakeholder inter-bank training, monthly number reporting and marketing strategy development into collateral creation. This platform has won 2 awards from The Digital Banker in 2022 & 2023!

STAR Management Associate

Standard Chartered Bank Malaysia

07/2019 - 11/2020

Achievements/Tasks

- Equities - Process development aide to bring in US equities paving the way to selling US Securities and developing more advanced product lines in the bank.
- Project - Driver of the SC Retirement Initiative for client education & activation in investments. Project lead with the development of a portfolio generator and propriety certification for a 10-man priority sales team. Initiative has resulted in MYR19mil in sales during project lifetime.
- Part of the talent program to cultivate future leaders, have gone through a mentorship program and organized team building activities for the program.

CORPORATE FINANCE EXECUTIVE

Tropicana Corporation Berhad

03/2018 - 06/2019

Achievements/Tasks

- Building and strategizing with financial models for large scale projects with financing and consultancy stakeholders.
- Management of property valuation projects with valuation firms.
- In charge of Investment Relations portfolio and shareholder concern handling.
- Managing team for quarterly Company AGM.

CERTIFICATES

Investor Protection Professional Certificate (IPPC)

INTERESTS

Fitness - Half Marathon runner, avid gym goer

Self Development - Toastmasters

Charity - Team lead for our Annual Charity Home-run Competition, Corporate Charity Events

WORK PROJECT LISTING

SmartStocks - Online Equity Platform (06/2022 - Present)

▫ <https://www.sc.com/my/investments/smartstocks/>

LiveFX - Online FX Platform (12/2020 - 05/2021)

▫ <https://www.sc.com/my/investments/livefx/>

SC Retirement Project (07/2019 - 11/2020)

▫ <https://www.sc.com/my/investments/retirementplanning/>

EDUCATION

Bachelor of Business - Management

Latrobe University

01/2014 - 01/2017

ACHIEVEMENTS

Best Equity Trading Platform - The Digital Banker (12/2022 - 12/2022)

Outstanding Innovation in Digital CX - The Digital Banker Awards 2023 (05/2023 - 05/2023)