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Agnes is Director of Great Glory Investment Corporation, Senior Advisor of a Hong Kong single family office, and Senior Partner/Responsible Officer of Yaozhi Asset Management International. She manages a climate & ESG-centric Greater China equities portfolio. She is a holder of RA 4, 9 licenses issued by the Securities and Futures Commission, Sustainability and Climate Risk Certificate issued by Global Association of Risk Professionals, and ESG Investing Certificate issuer by CFA UK. She is a faculty member of Competent Boards and HKIoD/Ivey, and frequent speaker in forums and for institutes including HKCGI, HKICPA, and AICD.

She is an Expert Review Panel member for the MTR Corporation sustainability reports since 2014, an ESG judge for WealthAsia (Benchmark) Funds of the Year Awards, a Council member, Publishing Board of Magazine member and a Deputy Chair of the training committee of the Hong Kong Institute of Directors (HKIoD), board member of Hope of the City, advisory council/committee member of GARP (Hong Kong), Blue Onion and Shao Ming Lo Foundation.

In her 42 years of serving the financial community in China, Hong Kong SAR, the USA and Australia, she has established and managed investment companies, consultancy practices, and new business units within major financial institutions.

She has an MBA from the University of Chicago - Booth School of Business, a BSc (Honors) from Roosevelt University in USA, and is a graduate of the Stanford University Senior Executive Leadership Program and the 2011 Stanford Directors' College. Her PhD thesis at the Hong Kong University of Science and Technology is on sustainable investing. She has authored a book on investing in H-shares, a Harvard Business case and a positive psychology book 'Tall Miracles'.