

PI • Wealth Pi Talks

Meet Great People

圓周資本

WEALTH PI

PROFESSIONAL
WEALTH
INVESTMENTS





PI•

圓周資本

WEALTH PI

PROFESSIONAL
WEALTH
INVESTMENTS

What is Wealth Pi Talks?

Wealth Pi Talks is a series of knowledge sharing and networking events for industry professionals and high net worth individuals.

We strive to build an exclusive community with the core values being professional and integrity. Our mission is to provide expert views on current investment markets, especially in the real estate and wealth management industry as well as a platform to exchange ideas and create synergy.

Wealth Pi Talks invite distinguished speakers to share insights and experience. Many partners have joined us to deliver high quality events to cover various hot topics. Currently, Wealth Pi Talk is held on a monthly basis in either Sydney or Melbourne.

Gather Great People to Achieve Greatness

PI • Previous speakers

圓周資本

WEALTH PI
PROFESSIONAL
WEALTH
INVESTMENTS



Dan Gallen

Director of Pallas Capital and Fortis Development Group

Dan Gallen has completed over AU\$2 billion in structured real estate transactions. These have included in the capacity of a lender, developer, investor and debt advisor. This breadth of experience brings a well-rounded and practical approach to analysing and managing real estate debt and development transactions.



Wendy Fergie

Co-founder of CFA Society Melbourne
CIO at Wealth Pi Fund

Wendy has over 27 years experience in managing investment portfolios ranging from 4-14 billion. Working for a range of investment houses including AXA IM, Alliance Bernstein, ME Bank and IFM. She is a chartered financial analyst and one of the founding board members of the CFA Society Melbourne.



Xiaohu Liu

Managing Director at Wealth Pi Fund

As an experienced operator in the previous lending practice, Xiaohu helped local developers completed more than \$200 million debt advisory and commercial loan underwriting in the past three years. He has thorough understanding of Australian property market and successful experience in running mortgage funds in Australia.



Previous speakers



Olivia Jiang

Funding Manager at Tyee Capital

Olivia is well connected to international consortiums, top financial institutions, well-known developers as well as high net worth individuals in the Asia Pacific. Olivia has founded some successful enterprises and businesses in Australia and China.



Yu Lu

Managing Director at Tyee Capital

Mr. Lu has extensive investment experience for 18 years in convertible bonds, Pre-IPO, cross-border M&A, mezzanine financing and the privatization of listed companies. The total amount of projects cast he has managed have exceeded US\$1.5 billion.



Christina Jiang

Business Development Executive at Wealth Pi Fund

Christina has more than eight years of experience in investment field across Australia, Singapore and China. She holds a Master of Finance Degree from UNSW and a Bachelor of Economics Degree from Zhejiang University. She holds an extensive network base across the commodity, investment and real estate sectors.

More to come...



圓周資本

WEALTH PI
PROFESSIONAL
WEALTH
INVESTMENTS

Previous W.P. Talks

Exclusive & Insightful



Talks: property funding



Event: Retreat 2018 Sydney

Investment afternoon tea
with HNW investors



Sydney



Melbourne



Melbourne



Sydney

PI•

圓周資本

WEALTH PI

PROFESSIONAL
WEALTH
INVESTMENTS

Our Partners



PALLAS
CAPITAL

Fortis
Development
Group

Tyee Capital

 polyglot^{GROUP}

 LIFE YOU
CHOOSE

大成 DENTONS

 CFA Institute

WEN
Women in
Economics Network



 Hall & Wilcox
smarter law

Media Partners

 SBS

 ozreal.com
每日地產

 AFN

More to come...



**Keen to participate?
Interested in partnership?
Get in touch!**

Christina Jiang

Business Development Executive

M: +61 416 685 999

E: christina.j@wealthpifund.com

