



Oxon Consulting

SOCIAL CARING SERVICES

WHITE PAPER



FFC CONSULTING SERVICES

WHO WE ARE?

FREE-FOR-CHARITY CONSULTING SERVICES



FFC is a division of Oxon Consulting dedicated to provide professional consulting services to charitable and non-profit organizations of the investment community and to support organisations that endeavour to help people in such areas as education, youth advocacy and poverty. Our commitment is to provide consulting services to charities who are committed to take their achievements to the next level. Our vision is to support those who are helping millions of others, multiplying the synergistic impact.

OXON CONSULTING



LEADERSHIP PROFILE

Ernest Leung, founder of Oxon Consulting, has been a licensed financial professional since 1993. He has spent 21+ years gaining experience in the financial industry and held key analytical responsibilities in leading financial companies including HSBC, JF, Allianz, Manulife, and ING Asset Management.

In his last role as Managing Director heading the Asia Performance Team in Manulife Asset Management, he accomplished the building of a regional performance platform that supports 10 Asian investment offices and 100+ front office professionals with production of daily, weekly and monthly performance, attribution and risk reports for analytical, client reporting and marketing purposes.



LEADERSHIP PROFILE

Ernest's Qualifications:

- BSc. Economics from University of Leicester (First-Class Honours Graduate)
- MSc. Economics from University of Oxford (Oxford Postgraduate)
- Chartered Financial Analyst® (CFA Charterholder)
- Member of the Hong Kong Institute of Financial Analysts
- Member of the CFA Institute



FFC SERVICES

FREE CONSULTING

FREE-FOR-CHARITY
CONSULTING SERVICES



FFC is committed to drive a sustainable impact at work. It provides professional consulting services to charities and non-profit organizations in such areas as PAS Platform Building, Independent GIPS Verification and Investment Manager Selection.

In addition to consulting services, FFC offers a number of pragmatic reporting tools that allow automatic generation of essential portfolio analytics, including performance, attribution, risk and peer analysis.

OXON CONSULTING



FFC SERVICES

FREE REPORTING & ADVERTISING

FREE-FOR-CHARITY
REPORTING & ADVERTISING SERVICES



We also support charities and non-profit organizations to achieve their goals by helping them promote their websites via free online advertising on Oxon web sites. All consulting and reporting services provided by FFC are available to charities and non-profit organizations for free. We will only impose a basic cost-recovery charge to maintain service quality and avoid the abuse use of free services. In some cases, charges may be set at zero due to other considerations. FFC reserves the right to provide the above services at our sole discretion.

OXON CONSULTING



DESIGNATED DONATION

TOGETHER, WE CAN MAKE IT

DESIGNATED DONATION



Designated Donation

Oxon believes in giving back to the community and to the greater good. In addition to the FFC services, we have a donation programme that includes charitable contribution as a regular part of our business model.

For each of our paid clients, we will donate 10% of our pre-tax income to charitable and non-profit organizations designated by the clients. For transparency in identity/amount/frequency, copy of official receipts issued by the charitable organizations will be provided for record keeping. Oxon reserves the right to approve or refuse the choice of designated organizations.



GREEN OFFICE ADVOCACY

BEING GREEN HAS ITS ADVANTAGES

GREEN OFFICE ADVOCACY



Investment managers require daily update of portfolio analytics as conditions of the financial markets keep changing. Most of these analytics reports are generated, printed and throw away immediately after use. Oxon encourages our clients to go green and paperless by adopting cloud-based technologies. It allows automatic generation of portfolio analytics reports to meet their needs for daily portfolio management and monthly client reporting. It saves not only paper/ink, but also the luxury of time that the investment managers & performance analysts spent on data recalculation & verification issues.



About Oxon Consulting

Oxon is a professional provider of industry solutions to financial institutions and asset management firms. We offer consulting services for the building of portfolio analytics reporting platform to asset management firms and pension plan sponsors. We also offer a number of pragmatic tools for performance and portfolio analytics reporting. Our unique ability to create quality, customized products – along with our unrivaled capacity to provide GIPS verification and investment manager selection services – makes us an indispensable partner to the investment community. Oxon has the right combination of technology and services to meet your needs.



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