



## TESS SHIH

<https://www.linkedin.com/in/tessieshih/>

Growth Strategist | Financial Expert | International Expansion |  
Alternative Investments | Big Data and AI | Board Director |  
Former J.P. Morgan | Harvard MBA | Fluent in Mandarin

### VALUE-ADDED EXPERIENCE FOR BOARDS

- **Growth Strategist:** Advised senior J.P. Morgan executives on \$30bn Asset Management strategy, \$7bn Card Services valuation analysis, \$90mm Washington Mutual retail bank cost savings integration, \$30mm strategic rebrand and Bear Stearns acquisition.
- **Financial Expert:** Detailed accounting of J.P. Morgan's \$2tn in assets and risks for US Department of Treasury's Troubled Asset Relief Program. Conducted alternative factor analysis and recommendation for Harvard's \$27bn endowment. Provided oversight of financial reporting and investments for Harbus Foundation and Toigo Endowment.
- **Global Business:** Raised \$6bn into equity, fixed income, and alternative strategies. Established investor relationships across US, Canada, UK, France, China, Hong Kong, Abu Dhabi, Qatar, Bahrain, Brazil, and Chile.
- **P&L Management:** Oversee \$1bn in assets. Closed \$250mm deal with Fidelity's managed account platform and \$100mm deal with firm's first US broker-dealer. Drive collaboration across Operations, Legal, Compliance, Client Service, and Human Resources.
- **Governance:** Expert and featured speaker, instrumental in helping publish finance industry reports on governance and risk management including investments and derivatives; big data and artificial intelligence; talent; investor alignment around fees, equitable compensation, and value service offerings; ESG and DEI.

### BOARD EXPERIENCE

15+ years of government, industry, and nonprofit board leadership:

- **Los Angeles County Library | 2021 – Present**  
86 library branches and 4 cultural centers providing services to 3.4mm residents. Annual revenues of \$165mm. Recipient of 2023 National Medal for Museum and Library Services. Commissioner | Chair, Benchmarking and Governance Committee | Member, Legislative Advocacy Committee
- **The WNET Group, Community Advisory Board | 2021 – Present**  
Emmy-winning PBS member station serving 1mm residents. Annual revenues of \$150mm. Board Member | Co-Chair, Nominating Committee
- **Alternative Investment Management Association | 2018 – Present**  
Industry group of 2,100 corporate members in 60 countries, managing \$2.5tn in assets. Board Member | Chair, Research Committee
- **Toigo Endowment | 2014 – Present**  
Board of Directors Vice Chair | Chair, Investment and Finance Committee
- **Harbus Foundation | 2009 – 2011**  
Board Member | Co-Chair and Trustee
- **University of Southern California, Marshall Leadership Council | 2005 – Present**  
Board Member, Marshall Alumni Association | USC Reunion Co-Chair | Co-Chair, Marshall Alumni Association of New York | Vice President, USC Alumni Club of New York

## EDUCATION

**Harvard Business School**

Master in Business Administration. Strategy and Finance.

Robert Toigo Foundation Fellow. Eugene Sit AAAM Fellow. Harvard's \$27bn endowment analyst.

**University of Southern California**

Bachelor of Science, summa cum laude. Business Administration and International Relations.

Trustee Scholar (full-ride). Commencement Speaker. Vice President of the Student Body, liaison to University Trustees. Recipient of Laurel and Palm Leadership Award (0.5% of graduates).

## CAREER HIGHLIGHTS

**Capital Fund Management | Region Head, Director of Institutional Sales**

\$12bn investment firm. Global operations across North America, Europe, and Asia

- Responsible for driving business results, acquired \$1bn new assets for funds invested across equities, fixed income, commodities, and currencies. Grew revenues by +10%.
- Lead international territory overseeing \$1bn in assets. Clients include pensions, endowments, foundations, family offices in the US, Canada, and Latin America.
- Negotiated and structured first \$100mm partnership with US broker-dealer. Helped launch standalone macro fund, \$400mm in assets. Secured \$250mm platform account.
- Awarded "Rising Star" by Institutional Investor, one of "50 Leading Women in Hedge Funds" by Ernst & Young, one of "40 Under 40" by InvestmentNews, and one of Crain's "Notable Diverse Leaders in Banking and Finance."

**J.P. Morgan Chase & Co. | Vice President, Corporate Strategy and Asset Management**

Leading financial services firm. Assets of \$3.7tn trillion and operations worldwide.

- Advised senior executives on time-sensitive cross line-of-business initiatives, increasing shareholder returns. Responsible for financial and operational analysis to develop corporate finance strategies across Asset Management, Card Services, and Banking.
- Conducted risk analyses and modelling for customized investment portfolio optimizations, presented pitches, training, and performance reviews to institutional investor Board of Directors, Trustees, and Investment Committees.
- Responsible for driving asset management business results, acquired \$5bn new assets for funds invested across equities, fixed income, real estate, private equity, real estate, infrastructure, and hedge funds. Extensive experience in marketing and distribution.
- Obtained securities licenses: Financial Industry Regulatory Authority (FINRA) General Securities Representative Series 7 and Uniform Securities Agent State Law Series 63, National Futures Association (NFA) National Commodities Futures Series 3.

## PUBLICATIONS

- In Sync – How hedge funds achieve alignment with investors to foster long-term strategic partnerships | 2023 | 2019
- Gaining an Edge – How hedge funds are navigating the new talent landscape | 2021
- Casting the Net – How hedge funds are using alternative data | 2020