







CHARLIE Q YANG

PH.D., CFP® (博士, 注册金融规划师)

PERSONAL PROFILE

Experienced financial services and technology consultant. AI Innovator & Mobile Payment Inventor. Former Vice President | Sr. FC | Branch Manager | Sr. Investment Specialist of Charles Schwab. Managed 500+ clients with \$1.2 billion AUM. Recognized as a key contributor to the growth of Schwab from 2003 to 2019.

CONTACT

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EDUCATION & LICENSES

Ph.D., M.A.Sc., BSEE
University of Victoria 1993

SKILLS

- Track-record of BD growth through client education, leadership, innovation, and process simplification.
- VC and M&A due diligence, increasing profitability, market & competitive analysis, FinTech development.

WORK EXPERIENCE

AFIEA, Lead FinTech Consultant | Founder

MAY 2019 - PRESENT

- Completed hundreds of FinTech consulting calls and supported the top-3/big-4 projects related to market & competitive analysis and financial technology.

Charles Schwab, VP | Sr. Financial Consultant

OCT 2003 - MAY 2019

- 5-time Schwab Chairman's Club Award Winner as a key contributor for business growth.
- Expertise in thematic investing, competitive research, financial market assessment, RIA selection.
- Created and executed 37 strategic business ideas.
- Coached 2018 Schwab Innovation Challenge Winner.
- Certified by Schwab for Local TV Financial Interviews.
- Certified Schwab International FC for Asia-Pacific.
- Developed Schwab's process to service domestic and international Mandarin/Cantonese clients.

ACIBA | ISIR, President | Management Consultant

MAY 1997 - OCT 2003

- Provided CEO level of management and strategic consulting and coaching services on business and investment (References: ACIBA.org, ISIR.com).