

Monte Jade November Financial Forum:

“The impact of the economic downturn to businesses, investments, and individuals”

Date: Tuesday, November 18, 2008

Time: 6:30 pm

**Location: China Stix Restaurant, 2110 El Camino Real
Santa Clara, CA 95050 Tel: (408)244-1684**

Starting with the failure of some of Wall Street's most respected firms, such as Bear Stearns, Lehman Brothers, and Merrill Lynch, to the massive bailouts of Fannie Mae, Freddie Mac, and AIG, the US economy is in a downward spiral. With other large banks threatening failure, the US government is stepping in with further assistance to financial institutions deemed too large and too important to fall - for the US economy and for its international trading partners, including China.

This panel will examine the impact of the US credit crisis on major businesses, investments and individuals.

Panelists:

**Tracy Wan, Former President & COO, The Sharper Image
Jonas Miller, Senior VP and Treasurer of UCBH Holdings, Inc.
and its subsidiary, United Commercial Bank
Farley York Lee, CPA, CIA, Senior Manager, Deloitte Financial
Advisory Services, LLP**

Moderator:

**Lilly Chung, a Lead Client Service Partner of key strategic
Deloitte clients**

Registration: www.MonteJade.org

Fee: Member \$25, Non-member \$30, Student \$20, Extra \$5 for site registration

Please register in advance and pay on site

Information: Please visit Monte Jade Website www.montejade.org



Panelist: Tracy Wan

Tracy Wan, Former President & COO of The Sharper Image, one of the most noted multi-channel retailer . At The Sharper Image, Tracy was President & COO for seven years, and the CFO for six years during a 18-year career (1988-2006). As President, Tracy led the company and her teams during the highest revenues and earnings growth periods, as well as took the company successfully through downturns to regain sales and earnings. Tracy served on the board of directors at The Sharper Image through 2006.

She had responsibilities for the Sharper Image's overall strategic initiatives, and all aspects of operations. Tracy's leadership also included two public offerings, added 100 stores in premier locations, grew e-commerce sales to more than \$100 milion, and added two distribution centers.

Tracy spent five years in public accounting, and is a CPA. Her other experiences include serving as VP of Finance for a real estate investment company where she was responsible for the finance and accounting of a group of REITs and public partnerships. Tracy currently lives with her husband and daughter in the San Mateo.

Since the beginning of 2008, Tracy is the Founder and Principal of Tracy Wan Advisory and Consulting Services. Client companies are in the businesses of: multi-channel retailing, e-commerce, social network, direct marketing, product design and manufacturing, investment firms, and non-profit. Services span from business plans, financial plans, retail operations and management, on-line marketing plans and execution, acquisition and investment evaluations, executive coaching and leadership training. Tracy is highly regarded as a team builder, strong communicator, and passionate leader.



Panelist: Jonas Miller

Mr. Jonas Miller is Senior Vice President and Treasurer of UCBH Holdings, Inc. and its subsidiary, United Commercial Bank. He oversees the investment portfolio, liquidity, foreign exchange, and interest rate risk management of the company. He has served in various capacities at the bank since 1993. He obtained his B.A. from U.C. Berkeley and M.B.A. from the University of Washington, and is a Chartered Financial Analyst.



Panelist: Farley York Lee

Mr. Lee is a Senior Manager in the Deloitte Financial Advisory Services practice. He specializes in business reorganizations and forensic investigations. He has worked in a variety of industries including consumer business, telecom, manufacturing, and technology. He has over ten years experience in assisting and advising companies in numerous distressed situations. Prior to Deloitte, he spent fourteen years in the private sector in a number of industries, including technology, transportation, and financial services.

Mr. Lee's experience in financial advisory and reorganization services include performing value maximization, strategy, cash forecasting, operational turnaround consulting, financial modeling, due diligence, valuation, business plan & viability assessments. He specializes in financial consulting engagements for debtors, creditors (including unsecured creditors committees), and lenders involved in turnarounds, loan workouts, and bankruptcies.

Representative engagements include Calpine, Upright Inc., Good Guys, Chiron, Qwest Communications, MCI WorldCom, Sega GameWorks, Legacy Estate Group, CellNet Data Systems, Bronco Coal, Natural Wonders, and Citigroup.

Education:

MBA, Finance, University of San Francisco
BS, Accounting and Finance, UC Berkeley

Professional Affiliations:

Association of Insolvency & Restructuring Advisors (board member)

Turnaround Management Association
Member of America Institute of Certified Public Accountants
Member of AAMA (Asia America Multi-Technology Association)



Moderator: Lilly Chung

Lilly Chung is a Lead Client Service Partner of key strategic Deloitte clients. She is the regional Women's Initiative leader, Semiconductor Affinity Group leader, and an executive member of Deloitte's Chinese Services Group. Ms. Chung started her career in a series of technical roles at TRW, Fairchild Semiconductor and Xerox. Later she joined Xerox's Strategic Business Office and developed her consulting career with CSC Index, KPMG, and Ernst& Young. Her experience expanded from business process reengineering to ERP implementation and

organizational effectiveness.

Lilly has helped major companies such as Acer Computer, Apple, Applied Materials, Cisco, Siemens, Solectron, and Xerox to improve their operational efficiencies. Her work was written up in Fortune Magazine. Ms. Chung currently serves as a Board Member of Monte Jade Association. Ms. Chung holds an MBA from the Harvard University, both B.S. and M.S. degrees in Electrical Engineering from the University of Southern California, and an M.S. in Industrial Engineering and Engineering Management from Stanford University.