**Vincent Chan**

**Review notes**

**Goals**

Goal 1: Not applicable to HII so no comments on my end

Goal 2: Met

* I agree with the comments provided by Vincent. He works as the lead staff on HII and not only guides Viteos, but steps in to help assist Donna on HIIA, when needed. Vincent has become the first level of review for Viteos and provides them with meaningful and well, thought-out comments. I believe this has helped him to become more analytical, which has allowed him to focus on the big picture. Vincent has helped to make the process with Viteos more streamlined between the two classes as he provides them with feedback on all major deliverables. He has been a great asset to the team.

Goal 3: Not applicable to HII so no comments on my end

Goal 4: Met

* I agree with Vincent’s comments regarding HII. He is pro-active about thinking of ways to streamline our processes in order to cut down the time spent on unnecessary work. Due to the structure of the fund, HII does require additional reports and deliverables on a monthly and quarterly basis. Therefore, by working on the areas mentioned in his goal he has contributed to both our efficiency and accuracy as a team. I encourage Vincent to continue to look for ways to cut down on inefficiencies.

Goal 5: Not applicable to HII so no comments on my end

**Core Competencies**

Results-orientation: Fully Meets

Business / Functional Expertise: Fully Meets

Influence: Fully Meets

Collaboration: Exceeds

Forthrightness: Fully Meets

Development-focus: Fully Meets

**Key Strengths and Additional Accomplishments:**

* Great positive attitude
* Team player
  + Takes ownership and accountability of his own work and maintains an optimistic attitude, even when stepping in to assist others (lead staff on HII)
  + Maintains a strong relationship with Viteos and is able to train them on deliverables and ad-hoc requests
* In order to properly set up HII, Vincent worked with his manager to fully understand the structure. He was then able to properly train Viteos and provide processes for them to follow. I agree that there have been some challenges with this fund (i.e, separate classes with one waterfall and the AIF structure. Vincent approached each challenge as a learning opportunity and as a way to enhance both his technical skills and knowledge of Oaktree. He takes full ownership and is able to see something through to the end. Vincent pro-actively communicates with his manager when he’s hit a road block on an issue and is always open to constructive feedback.
* Responsive to all staff, managers and other groups within the firm and actively follows up on questions and requests. He sees something through from start to finish and can execute well independently.
* Thorough in his review of Viteos’s work

**Keys areas for Development and Improvement:**

* When challenges arise, I would encourage Vincent to first take a step back in order to think through the issues and determine a proposed solution to his manager. Even if that solution is incorrect, it shows that he is resourceful and can navigate his way through the governing documents and support.
* Continue to leverage internal and external relationships which will make him become even more resourceful and efficient.