



OUR CLIENTS ARE GIANTS

AND WE ARE THE BRIDGE BETWEEN THEM

Headquartered in Silicon Valley, OceanIQ Capital is a diversified investment management firm operating as a global multi-family office.



ABOUT

OceanIQ Capital is a global multi-family office with the reach and vision to link resources and business across the globe. Our client families are giants in their

diverse industries, and we are the bridge that connects them. We seek to be the dynamic conduit that accelerates growth, bridging the gap between technology and market, far-reaching talent and the capital that fosters it.

WHO WE ARE



Kai Chen, CFA

Kai is the Founder & Managing Director of OceanIQ Capital. As the company head, his primary role is to provide strategic vision, investment advisory, and relationship management. He started his investment management career at Goldman Sachs Private Wealth Management, specializing in asset allocation and investment strategies. He later spent 12 years at Credit Suisse and was most recently a Director and Relationship Manager. He has worked extensively with prominent families on investment management, trust & estate planning; with corporate founders on selling strategies such as 10b5-1 plans; and with private equity fund managers on block trading and diversification strategies. Kai graduated from UCLA

with a BA in Business Economics and is a Chartered Financial Analyst. He currently sits on the board of OceanIQ Capital ([index.html](#)) FLY (Fresh Lifelines for Youth), a non-profit dedicated to serving at-risk youth. An avid golfer and runner, he currently resides with his wife and two children in San Francisco.



Lucy Jing

Lucy is the Co-founder & Director of OceanIQ Capital, where she focuses on managing daily operations and the building of STRATEGIC PARTNERSS. She started her wealth management career at Bank of

America International Private Bank, where she spent 7 years servicing high net worth families in Asia. [OceanIQ Capital \(index.html\)](#)

After Bank of America's merger with Merrill Lynch, she spent 4 years at the Menlo Park office working mainly with Silicon Valley professionals and entrepreneurs. In 2012, Lucy joined Kai at Credit Suisse to deepen her expertise in servicing both the local and offshore markets. She actively worked with partners (CPAs and wealth transfer/immigration attorneys) to deliver customized solutions in the areas of cash/credit, investment allocation, retirement, and wealth transfer planning. Lucy is fluent in Cantonese, Mandarin, and Shanghai dialect. She enjoys travel and spending quality time with her husband and daughter in the Bay Area.

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