

# JACK YAN



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## OBJECTIVE

To excel in my field and add value within the organization. My leadership, dedication and management skills in audit can be utilized towards being one of the top performers, delivering results beyond standard expectations.

## SKILLS

### Team Leadership –

Proven experience in leading projects and managing junior staff, meeting key deadlines

### Business Partnering –

Proven success working with all stakeholders in driving change and process re-engineering

### Results Orientated –

Proven success in achieving cost savings and improving operational bottom line

## EXPERIENCE

### Career Synopsis:

Sydney University has over 50,000 students, **10,000 staff** and a diverse range of operations (16 faculties, **\$1bn** investment portfolio, 5 commercial farms and commercial consulting arms). With over **\$2bn** in annual turnover and **\$6bn** in assets under management, the University's commercial and educational operations also span the APAC region.

### The University of Sydney

Principal Auditor, ARM

Jul 2014 – May 2016

Senior Auditor, ARM

Mar 2012 – June 2014

Treasury Accountant, FCT

Jul 2011 – Feb 2012

Auditor, ARM

Jan 2010 – Jun 2011

Intern, ARM

Mar 2009 – Dec 2009

### PwC, Sydney

Summer Intern (RCG Assurance)

Jan 2009 – Feb 2009

### Principal Auditor

Mar 2009 – May 2016

The AUDIT team consists of the Director with 5 Principal Auditor direct reports and 4 junior staff. Starting as an intern, I was able to rapidly progress through to Principal Auditor in 5 years, a position with the same responsibilities as my peers with more than 20+ years of audit experience. Spending almost 2 years in the role, I was responsible for:

- Leading compliance, operational, financial, IT and forensic investigation audit projects, presenting findings and recommendations to senior management committees;
- Preparing financial and management reports for business units including variance analysis, budgeting and forecasting to support business operations and improve business initiatives;
- Leading the review of the pre- and post-implementation of major ERP systems, assessing risk and control environments as well as adequacy of system integration with business processes;
- Leading reviews of project financial health and viability through financial modelling, forecasting and what-if analysis and reporting findings/recommendations directly to senior management;
- Leading internal corruption investigations and performing forensic accounting.

### Key Achievements

- Delivered 29% reduction in annual spend obligations (\$15m), the implementation of a 3-year investment review process and major investment policy changes through financial modelling and what-if analysis, and other reviews of the University's endowment portfolio;
- Delivered major IT controls for the new \$100m ERP system resulting in improved security, 50% reduced users and implementation of compliance programs for key business functions;
- Delivered \$4.5m in cost savings through forensic accounting in a corruption investigation resulting in ICAC court proceedings and employment termination;
- Delivered 15% (\$0.8m) student free increases and improved profitability of educational projects abroad through financial analysis and identifying FX, market and statutory risks; and
- Delivered 12% revenue increase (\$0.6m) and 7% reduction in operating costs (\$0.4m) of SCA operational activities through financial modelling and market risk analysis.



### **Treasury Accountant (Financial Control and Treasury)**

**Jul 2011 – Feb 2012**

As a treasury accountant, my duties involved forecasting and reporting on University-wide cash flow activities, updating information and providing management with financial commentary. In addition to my regular duties, I was also given the extra responsibility for developing new reporting templates (including forecasts, budgets and information updates) for large government grants.

#### **Key Achievements**

- Delivery of reporting templates and financial models for \$320m in grants resulting in \$15m interest allocations and establishment of financial budgets and forecasts;
- Delivery of the University's \$1.5bn 2012 Cash flow Forecast resulting in streamlined and automated reporting inputs, increasing accuracy and reduction of manual entry work; and
- Delivery of the University's \$227m investment cash flow, automating data inputs and reconciliation controls resulting in improved reporting and increased accuracy.

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## **EDUCATION**

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Bachelor of Commerce, University of Sydney

Member of the Institute of Chartered Accountants Australia and New Zealand (Formerly ICAA) – HKICPA equivalent

Level I Candidate of the Chartered Financial Analyst (CFA) Institute – in progress

#### **Language Proficiencies:**

English	– Fluent
Chinese (Mandarin)	– Professional
Chinese (Shanghainese)	– Professional

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## **OTHER INTERESTS**

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- Brazilian Jiu Jitsu;
- Muay Thai;
- Crossfit;
- Rugby/Oztag;
- Volunteer and Charity work – Birds of Passage, Children's Cancer Council; and
- Running – Sydney Marathon, Sydney Half Marathon and City2Surf.