Haining (Kate) Jiang

(917)941-5101 | haining.jiang@baruchmail.cuny.edu | www.linkedin.com/in/katehjiang

Education

Baruch College - City University of New York | New York, NY

M.S. in Information System | May 2019
GPA: 4.0/4.0
Data Analytics Concentration
M.S. in Accounting | May 2016
GPA: 3.86/4.0
Beta Gamma Sigma Academic Honors

Guangdong University of Foreign Studies | Guangzhou, China

B.S. in Economics | July 2014
GPA: 3.44/4.0
Integrated Excellence Scholarship; Academic Honors
Academic Honors: 2012, 2013
Leadership: Drama Competition, Director; TGC Model Team, Vice President
Exchange Program: Columbia University, GPA: 3.77

Professional Experience - Domestic

Tax Analyst | Current
Morgan Stanley | New York, NY

- Perform Robotic Testing for automation on 1042S Exception Report, provided automation procedures and QA testing on parallel check-out

- Provide training to and oversee the new hires to support daily tasks including documentation, compliance and reporting

- Support Morgan Stanley Service Network under Client Tax Reporting Department, including W8/W9 instruction, withholding inquiries, 1042S and 1099 information reporting, B-Notice and C-Notice guidance

- Work on Compliance Project: US T-Bill and foreign CUSIP, W8 Reopen Report, and 1042S Exceptional Audit Report, Reject Report, Control Report

- Research the cause of improper tax withholding and guide IT to block/charge withholding by CUSIP or account

- Report investment income and tax withholding for 1099 filing, extract 1042S detail report, and analyze securities affected by income reallocation and foreign tax gross-up process

- Assist managers on special projects: analyze annual projected income with pivot table, cross-reference existing accounts with vlookup, and compile multiple worksheet with macro VBA

Bank Reconciliation Assistant | Jan 2016 – May 2016
Penmark Management, LLC. | New York, NY

- Researched discrepancies and reconciled bank deposits and withdrawals to operating cash in general ledger for over 150 accounts

Accounts Payable Intern | Jan 2015 – May 2015
Nike Communications INC. | New York, NY

- Recorded Accounts Payable transactions and generated invoices for monthly retainer and expenses in QuickBooks Enterprise

- Allocated overhead among clients, monitored budgets, and filed supporting documents adhering to the established expense process

Skills

Programming: SQL, Python, VBA, C++, R
MS Office Suite: Word, Excel, Access, PowerPoint
Accounting, Auditing & Tax: QuickBooks Enterprise, Sharepoint, IPS, MD3, 3D, Java Mainframe
Language: Mandarin & Cantonese (Native), English (Fluent)

Projects

Data Analysis with Spreadsheet

- Implemented Python Pandas to parse raw data from NYC Open Data to pre-screen desired data

- Established trend analysis in spreadsheet to visualize data using 3D Map, Pivot Table, VBA Macro, Histogram and Regression

Database Development with SQL

- Designed a E-R model with UML notation for auto insurance company to manage policies holders and damage claims

- Normalized the E-R model to improve conciseness and performance and built the database structure in Access using SQL

- Imported data and run SQL queries to identify patterns in damage claim, in order to improve policy design and profitability

Trend Analysis for Investing Instrument with Python

- Developed Pandas and Numpy to parse web data for various investment instrument: stock, gold, oil, bitcoin, etc.

- Transformed unstructured data into comparable format and executed regression analysis between the objective data and SPY500

Professional Experience - Foreign

Finance Intern | Apr 2014 – May 2014
ZKING Insurance Co., LTD. | Guangzhou, China

- Collaborated with Finance Manager on annual documentation project to ensure the accuracy of accounting vouchers for Guangdong center and its secondary branches

Assurance Intern | Jan 2014 – Feb 2014
PricewaterhouseCoopers | Guangzhou, China

- Assisted senior associates with audit procedures, such as vouching invoices to confirm accuracy of accounts payable balances

- Obtained accounting documentation from clients, prepared audit work papers, and consolidated the accounts of subsidiary corporations

Multinational Sourcing Service Intern | Oct 2012 – Nov 2012
China Import and Export Fair | Guangzhou, China

- Compiled and analyzed supplier profiles for the managerial team, and organized conferences to promote the attending companies