

Haining (Kate) Jiang

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EDUCATION

Baruch College - City University of New York | NEW YORK, NY
M.S. in Information System (GPA: 3.81/4.0) | JULY 2019

Data Analytics Concentration

Baruch College - City University of New York | NEW YORK, NY
M.S. in Accounting (GPA: 3.87/4.0) | MAY 2016

Beta Gamma Sigma Academic Honors

Guangdong University of Foreign Studies | GUANGZHOU, CHINA
B.S. in Economics (GPA: 3.44/4.0) | JULY 2014

Columbia University | NEW YORK, NY
Exchange Program in Economics (GPA: 3.77/4.0) | JULY 2013

PROFESSIONAL EXPERIENCE - DOMESTIC

Database Developer | OCT 2018 - PRESENT
Lek Securities Corp | NEW YORK, NY

- Re-designed software to determine transaction fee and apply markup for various Exchanges, which changed the profitability of transaction fee from break-even to profitable
- Monitor the database and analyze data to reconcile bills by querying massive data for annual comparison

Tax Analyst | JAN 2017 - MAY 2018
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

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, C#, 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