

DONALD FUNG

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WORK EXPERIENCE

BASECAP ANALYTICS

Financial Solutions Associate

New York, NY

June 2017 – Present

Conflicts Office Operating Environment Build and Lines of Business Expansion Project

September 2018 – Present

- Drafted requirement documents, process flows, architectural designs, screen mock-ups, and project timelines to support a new operating environment build with data integration and technology-driven controls for an investment banking legal function
- Created training materials and procedures and facilitated and tracked training of ~6,000 bankers over the course of three phases
- Generate operational metrics, weekly status reports, and budget forecasts while ensuring strategy align with client priorities
- Organize test scripts, provide overall testing support, and maintain a list of issues and enhancements for future BAU releases

Forward Mortgages Data Migration Project

December 2017 – May 2018

- Guided our client bank in sub-servicing their forward mortgage portfolio by understanding the data needs of downstream users and creating requirement documents to communicate the changes needed to be made to the development team
- Aggregated all the expected code changes into a comprehensive value reference file and reconciled differences in critical values such as loan numbers, property types, investor category codes, ARM index codes, and modification types
- Provided overall testing support and led in resolving many data issues discovered in Trial 1 and Trial 2 of testing

Y-14M and Y-14Q Regulatory Reporting Data Lineage and Data Validation Project

June 2017 – November 2017

- Performed data lineage between 25 data systems for the 14Q reporting process and 13 data systems for the 14M reporting process by working closely with clients and the team to figure out the data flow, gather list of fields or SQL code, and validate the lineage
- Created and maintained comprehensive tracker to manage the points of contact, data needs, progress, and client approvals

Company Branding and Platform Development

June 2017 – Present

- Work closely with CEO and CFO to build the company's brand as a tech-focused consulting firm as the first full-time employee
- Support company's platform development with testing, triaging via GitHub, demoing, and creating product pitch presentations

FEDERAL HOME LOAN BANK OF NEW YORK

New York, NY

Management Reporting

June 2016 – May 2017

- Prepared monthly and quarterly variance reports on the financial products portfolio and firm-wide expenses
- Applied statistical analysis on a 5-year business cycle to calculate the Return on Risk-Adjusted Capital (RORAC) of each of the bank's products to optimize capital allocation for the bank
- Led a team of seven interns that presented to the executive team on the shadow banking industry and its effects on the bank and its member institutions and recommended compliance-assisting solutions

EQUINOX – BLINK FITNESS

New York, NY

Financial Planning & Analysis Intern

June 2015 – August 2015

- Developed a membership and check-in forecasting model and forecasted demand with ~98% accuracy for June through August
- Conducted public information research on competitors to understand their financial performance, franchise business model, and operational practices and presented my findings to the CEO and the leadership team ahead of Blink's franchising initiative

EDUCATION AND PROJECTS

BARUCH COLLEGE – MACAULAY HONORS COLLEGE

New York, NY

Bachelor of Business Administration

May 2017

- Majored in Finance and Investments and took courses in corporate valuations, financial econometrics, and business case studies
- Received the William E. Macaulay Honors College Scholarship and completed an honors program minor in NYC Studies
- Received the Zicklin Honors Program Scholarship and completed an honors program minor in Advanced Business Analysis
- Studied abroad in Tokyo, Japan and took courses in Japanese culture, filmmaking, and marketing
- Initiated the Baruch Consulting Club, the first consulting organization at Baruch, with a small, dedicated team to offer students case studies presented by professors, networking opportunities, and the chance to acquire real-world experiences by providing small, local businesses with pro bono consulting services with the guidance of professional consultants as mentors

CUNY-IBM WATSON COMPETITION

New York, NY

Finalist

February 2017 – May 2017

- Collaborated with a team of five to identify how IBM Watson and Bluemix services can be applied to improve public services for homelessness by creating an integrated platform of personal profiles among DHS and relevant non-profit organizations
- Developed a business case proposal and a one-minute video to pitch our idea to IBM staffs and campus representatives

CERTIFICATIONS, SKILLS, AND INTERESTS

Certifications: Certified Scrum Master (CSM)

Technical Skills: Microsoft Excel (including Pivot Reports and VBA), GitHub, SQL, R Programming, and Bloomberg Terminal

Languages: Native Fluency in Cantonese, Limited Working Proficiency in Mandarin and written Chinese

Interests: Karaoke, Fencing (Foil), Volunteering, Mentoring, Learning History, International Relations, and Learning New Languages