
EXPERIENCE

River Rock Capital Partners

Huntersville, NC

Investment Analyst

- Project rental income and fair market value for single family properties based on market data
- Predict property tax and renovation expenses for rental properties
- Prepare and verify information regarding to seller's discourse, public tax records, and HOA requirements
- Identify properties meet specified net yield requirement, underwrite single family residential assets based on PRO FORMA projection
- Coordinate with asset manager, agent, and client for due diligence and transaction related tasks

Dataphiles Programming

Raleigh, NC

SAS programmer Associate

Sep 2016 – Apr 2017

- Provide computer programming support to clinical trial project teams
- Use SAS to develop and validate analysis datasets, tables, listings and figures
- Document SAS programs, project status

Concord Hospitality Enterprise

Raleigh, NC

Finance Coordinator

Oct 2014 – Mar 2015

- Assisted with Financial Feasibility Analysis, building PRO FORMA models for revenue projections for hotels
- Provided Assistance in the day to day operation of the finance department, including underwriting, Internal Audit and legal document preparation and all finance related functions

CSU Student Summit Fund

Fort Collins, CO

Industrial Sector Investment Analyst

Jan 2013 – May 2013

- Conducted revenue projection for target companies, built projected income statements on Excel spread sheets
- Performed Scenario analysis based on the projected income statements, put different parameters, such as growth rate, risk premium, inflation rate into the models, tested the profitability of target companies in different scenarios
- Determined the intrinsic value of stocks based on discount cash flow model using Excel spread sheets
- Presented Investment proposals to Board members

CERTIFICATIONS

- CFA level III Candidate
- SAS Advanced Programming Certification
- Bloomberg Equity Research Certification

EDUCATION

North Carolina State University

Raleigh, NC

Master of Financial Mathematics

Aug 2015 – Aug 2016

Colorado State University

Fort Collins, CO

Bachelor of Science in Business Administration

Aug 2011 - Aug2014

- Finance Concentration

Bachelor of Science in Mathematics

Aug 2011 - Aug2014

- Statistics Concentration

SKILLS

- Financial time series modeling: ARMA model, Cointegration test, Nonstationary series data, Model selection
- Statistical modeling with R and SAS: Linear and Logistic Regression, Decision Tree, Credit risk modeling
- Financial derivatives pricing: option, CDS, Term structure modeling, Interest rate swaps, Caps, Floors
- SAS (2 years): Data step, Macro Facility, SAS / ODS, SAS SQL
- R (5 years): Principal components analysis, factor analysis, parameter optimization and clustering analysis
- Professional Excel functions :VLOOKUP, PIVOT Table, Macro

HONORS

- Cum Laude Graduate (Top 10%)
- Dean's List 2011- 2012