

王宇祺

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教育背景

2018.09-2022.07

上海大学, 悉尼工商学院

国际经济与贸易

经济学学士

• 绩点: 3.25/4.0

• 核心课程: 国际贸易实验(98)、计量经济学(98)、货币银行学(97)、管理会计(97)、跨国公司投资(96)、财务管理(94)

2020.08-2022.05

悉尼科技大学, 悉尼工商学院

国际商务

商务学士

• 绩点: 5.38/7.0

• 核心课程: 国际财务管理(3.7)、全球运营与供应链管理(3.7)、国际市场营销概论(3.7)、管理的全球环境(3.7)、商业洞察与创新(3.7)

2024.08-Now

香港中文大学, 工商管理学院

市场学

理学硕士

实习经历

2024.03-2024.06

红塔证券股份有限公司

投资银行部实习生

• 协助实地尽调: 随同财务组长期驻扎项目公司开展申请新三板上市前的财务审计尽调, 实施全面的细节性测试、内控测试、截止测试、银行对账核查以及实地盘点, 期间核验了公司近两个会计年度的财务数据, 抽凭检查了 500 余份关键财务文件, 包括发票、收据、合同和银行对账单等;

• 撰写财顾报告: 参与西双版纳州某景区公司财顾报告制作, 独立完成行业情况分析和未来发展方向的撰写, 输出文稿近 50 页, 随同负责人到项目地开展实地尽调, 并就审核要点及改进措施与客户进行交流。

• 编制内部资料: 整理已发行公司债券基本要素, 收集主板、创业板、科创板、新三板 IPO 及债券审核案例, 分析交易所反馈意见, 梳理业务关注要点, 生成 PPT、表格、报告近 20 份, 作为公司内部资料使用;

• 参与项目推进: 参与某云南省属国企公募债项目、某湖南省民企新三板保荐项目、某云南省北交所上市公司定增项目、某昆明市晋宁属国企私募债项目, 撰写项目相关材料 30 余份并全程跟进项目内审流程。

2023.03-2023.06

华泰证券(上海)资产管理有限公司

不动产基金部项目执行岗实习生

• 撰写推介材料: 解读发改委和证监会等监管机构相关政策, 分析公募 REITs 产品架构、税务筹划、资产出并表等问题, 阐述水务、能源发电、消费型基础设施公募 REITs 审核要点及解决方案, 输出近 50-90 页推介材料十余份;

• 撰写投标材料: 参与某山东省属国企消费基础设施项目、某洛阳市属国企景区项目、某遵义市属国企景区项目、某长沙市属国企水务项目的投标工作, 独立撰写四份 200 余页的投标响应文件;

• 撰写沟通函回函: 参考国家发改委和证监会文件, 基于仓储物流行业发展趋势、驱动力及障碍, 对标已上市可比项目, 向区人民政府回复某公路港基础设施 REIT 项目的关注要点;

• 筛查底层资产: 整理已上市 REITs 所有项目的基本要素、估值现金流情况、基础资产及合规情况等作为公司内部资料使用, 根据出租率、营业收入等挖掘商业集团旗下资质良好的消费基础设施底层资产, 生成表格、报告近十份。

2022.02-2022.06

上海里瑟琦商务信息咨询有限公司

咨询业务部研究分析岗实习生

• 参与高校研究: 协助分析员进行中国 C9、E9、“双一流”高校、各省地方高水平大学等高校教育评估研究, 定期形成高校评估周报及月报研究成果, 参与中国高校学科和专业调研及相关课题研究, 参与完成同济大学、重庆大学、华东理工大学和工信部七校等报告撰写。

• 维护高校数据库: 接受数据挖掘和清洗团队相关知识的培训, 根据高校和机构的学校及学科分析咨询服务需求, 定期维护、完善和分析高校学科、学者等相关数据库, 参与完成中国科技部科技人才交流开发服务中心尖端科学家遴选和华为车尖端学者遴选项目;

• 撰写分析报告: 参与华为·爱立信全球科研合作、TOP 车企高校合作情况调查分析报告, 负责数据分析和高校及学者情况撰写工作。

2021.05-2021.08

云锡(上海)投资发展有限公司

锡国内事业部业务岗实习生

• 处理商务合同: 协助部门主管处理对外商务合同, 全程参与合同起草、开具发票、发货、收款、归档等业务工作;

• 追踪内审流程: 负责按流程执行合同的内部评审递交工作直至最终法人签字盖章, 期间主动与客户保持沟通联系, 通过与相关部门的协调配合, 及时处理客户诉求近三十条, 客户满意度超过 95%;

• 撰写会议纪要: 负责客户交流会、部门周会等会议纪要的输出及相关工作文档的管理工作, 共计输出会议纪要十余篇;

• 文件归档登记: 负责当日业务的当日台账登记, 定期按规定将合同相关基础档案归档, 共计对五份大型合同及相关材料进行归档。

项目经历

2020.01-2020.02

中外服·国际志愿者实习项目

项目组组长

该项目致力于对美国公益性服务行业的现状与未来发展进行亲身体验和探索研究, 以理疗性马场的服务工作为具体开展方向旨在对目标行业形成全面性认知。

• 接受马场职业技能培训, 负责残障人士的接待、陪护工作, 引导、辅助残障人士接受马术心理治疗课程, 共计服务人次近三十人, 半数以上为官方认证的残疾人士, 客户服务评价等级为 A+;

• 每周定期组织地区内组员开展线上总结会, 主要包括服务内容、心得体会和评价建议三方面内容, 会后独立负责将会议内容整理、编排后形成会议记录和工作报告, 共组织组会 4 次, 输出报告 12 份。

荣誉奖励

• 2018-2019 学年上海大学悉尼工商学院单项奖学金

• 2020 年第八届全球大学生国际经贸与商务专题竞赛中国地区选拔赛 二等奖

• 2020 年全国高校商业精英挑战赛“云泽杯”营销模拟决策竞赛全国总决赛 一等奖

• 2020 年全国大学生职业发展大赛校级赛 三等奖

• 第五届全国大学生学术英语词汇大赛本科组 二等奖

技能与证书

• 专业证书: 国际贸易师初级证书, 证券从业资格证书, CFA 一级

• 语言能力: 英文可作为工作语言, CET-6: 540, IELTS: 7.0/9.0, GMAT: 675/805 (96th)

• 专业技能: 熟练使用 Office (PowerPoint, Excel, Word)、Stata、iFind、Wind、Scopus 和 Scival 等办公软件

• 兴趣特长: 足球 (上海大学校赛冠军)、篮球 (上海大学校赛亚军)、声乐 (上海大学十大歌手)

WANG, Yuqi

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Education

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|---|--|------------------------------|
| 2018.09-2022.07 | SILC Business School, Shanghai University | Bachelor of Economics |
| <ul style="list-style-type: none">• GPA: 3.25/4.0• Relevant Courses: International Trade Experiments (98), Econometrics (98), Monetary Banking (97), Management Accounting (97), Multinational Corporations Investments (96), Financial Management (94) | | |
| 2020.08-2022.05 | SILC Business School, University of Technology Sydney | Bachelor of Business |
| <ul style="list-style-type: none">• GPA: 5.38/7.0• Relevant Courses: International Financial Management (3.7), Global Operations & Supply Chain Management (3.7), Introduction to International Marketing (3.7), Global Business Environment (3.7), Business Insights and Innovation (3.7) | | |
| 2024.08-Now | Faculty of Business Administration, CUHK | Master of Science |

Internship Experience

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| 2023.03-2023.06 | Hongta Securities Co.,Ltd. | Intern in IBD |
| <ul style="list-style-type: none">• Supported the finance team in on-site financial audit due diligence for a New Third Board listing, conducting substantive testing, cut-off testing, internal control testing, related party transactions review, and physical inventory counts. Verified the financial data for the past two accounting years, and conducted sampling checks on over 500 key financial documents, including invoices, receipts, contracts, and bank statements.• Contributed to a financial advisory report for a scenic area company in Xishuangbanna. Independently completed the industry analysis and future development direction sections, producing a document of nearly 50 pages. Engaged with clients on improvement measures during on-site visits.• Organized case studies of reviews for IPOs and bond issuances from various stock exchange categories, analyzed feedback from exchanges, summarized business concerns, and generated approximately 20 PowerPoint presentations, tables, and reports for internal company use.• Involved in multiple projects, including public and private bond, private placement, and New Third Board sponsorship projects. Wrote over 30 project-related materials and followed the internal review process throughout the project. | | |
| 2023.03-2023.06 | Huatai Securities (Shanghai) Asset Management Co., Ltd. | REITs/ABS Project Intern |
| <ul style="list-style-type: none">• Drafted promotional materials by interpreting policies from the NDRC and CSRC, analyzing public REITs structures, tax planning, and asset management issues. Outlined key audit points and solutions for public REITs in sectors such as water utilities, energy generation, and consumer infrastructure. Delivered over 10 sets of promotional materials, each ranging from 50 to 90 pages.• Compiled bidding documents for projects of state-owned enterprises in Shandong, Luoyang, Zunyi, and Changsha, independently drafting four responses totaling 200+ pages.• Prepared communication materials for the local government, addressing concerns in a logistics infrastructure REIT project based on industry trends and comparable listed projects.• Screened underlying assets by reviewing key elements of listed REITs, analyzing cash flow and compliance, and identifying high-quality consumer infrastructure assets, delivering around 10 reports. | | |
| 2022.02-2022.06 | IDM Research Co., Ltd. | Intern in Consulting Department |
| <ul style="list-style-type: none">• Contributed to educational assessments for top Chinese universities (C9, E9, "Double First-Class" universities) by assisting analysts, producing weekly and monthly reports, and co-authoring reports for institutions such as Tongji University and Chongqing University.• Maintained and enhanced the academic database based on consulting needs, supported the selection of top scientists for China's Ministry of Science and Technology, and contributed to Huawei's leading scholar selection project.• Drafted analysis reports on global research collaborations between Huawei and Ericsson, focusing on data analysis and university cooperation. | | |
| 2021.05-2021.08 | Yunnan Tin (Shanghai) Investment Development Co., Ltd. | Intern in DB Department |
| <ul style="list-style-type: none">• Supported business contract management, including drafting, invoicing, shipping, payment collection, and filing.• Managed internal contract processes, ensuring customer communication and resolving over 30 inquiries with a satisfaction rate exceeding 95%.• Produced more than 10 meeting minutes and managed related documentation for department meetings and client discussions.• Handled the daily logging of business activities and archived major contract documents, organizing materials for five large-scale contracts. | | |

Project Experience

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|---|--|------------------------------|
| 2020.01-2020.02 | CHI Short-Term Enrichment Programme | Regional Group Leader |
| <p>The project focused on exploring the status and future of the public service sector in the U.S., specifically working with therapeutic equestrian centers for individuals with disabilities.</p> <ul style="list-style-type: none">• Completed professional training in equestrian center operations. Provided services to nearly 30 clients, over half of whom were officially certified disabled, with service ratings consistently achieving A+ standards.• Organized weekly online team review meetings with regional team members. Independently compiled and formatted meeting minutes and work reports, completing four meetings and delivering a total of 12 reports. | | |

Honors & Awards

- 2018-2019 Shanghai University Sydney Institute of Commerce Special Scholarship
- Second Prize, 8th Global Student International Trade & Business Competition (China) 2020
- First Prize, National Business Elite Challenge "Yunze Cup" Marketing Simulation Decision Contest 2020
- Third Prize, National University Career Development Competition (University Level) 2020
- Second Prize, 5th National Academic English Vocabulary Competition (Undergraduate Group)

Skills & Certifications

- **Certifications:** Junior International Trade Specialist, Securities Qualification Certificate, CFA Level I
- **Languages:** Proficient in English (working proficiency), CET-6: 540, IELTS: 7.0/9.0, GMAT: 675/805 (96th percentile)
- **Professional Skills:** Proficient in Office Suite (PowerPoint, Excel, Word), Stata, iFind, Wind, Scopis, Scival
- **Hobbies:** Soccer (University Champion), Basketball (University Runner-up), Vocals (Top 10 Singers at Shanghai University)