LISA LEU

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EXECUTIVE SUMMARY

- Business Analyst professional with 8 years' experience in Wealth Management and bachelor's degree in Economics and Finance.
- Proven experience across the software development life cycle from defining user requirements on small-medium enhancements and initiatives, to leading larger and more complex cross-functional projects.
- Business analyst skillset in requirements elicitation and documentation, process mapping and solution design, combined with a strong understanding of financial systems and operational structures within the financial services domain.
- Demonstrated ability to engage effectively with stakeholders at all levels, collaborative approach to requirements elicitation and strong team work ethic.

EDUCATION & TRAINING

Certification of Capability in Business Analysis (CCBA)   2018
International Institute of Business Analysis

Certified Professional Scrum Master I   2017
Scrum.org

Duke University – Business Analytics Specialisation   2017
Coursera (online)

Business Systems Analysis course (IIBA endorsed/PMI accredited)   2016
Softed

Foundation Level CPA Program   2015
CPA Australia

Bachelor of Commerce - Double Major in Economics & Finance   2007
Curtin University – Bentley, WA
      Distinction average achieved
      Member of the Golden Key International Honour Society

Secondary Education Certificate   2001
Mount Lawley Senior High School - Mount Lawley, WA
      Tertiary Entrance Rank of 93.15 achieved

EMPLOYMENT HISTORY

Netwealth – Business Analyst   Jan 2017 – current
Melbourne, VIC

- Lead BA on the Netwealth mobile app project:
    - Ran workshops and story mapping sessions with senior business stakeholders elicit and define business requirements
    - Worked closely with external design consultants to construct and adapt mobile wireframes using Figma and Axure, in adherence with Netwealth's style guide and Apple standards
    - Applied Lean/Agile methodologies in a highly-collaborative team to successfully deliver MVP mobile app on the App Store within a strict timeframe
    - Developed a project plan for delivery of MLP enhancements and of the Android version of the app
- Lead BA on adviser/client-facing platform enhancements including implementation of 2FA, and online application form re-write
- Collaborated with internal stakeholders to elicit and document requirements for enhancements to Netwealth's admin platform including extending fee maintenance and user security administration functionality
- Trained and supported users on new platform functionality including developing process documentation and providing general application support assistance to the business as required
- Formulated and executed Quality Assurance test plans of developed solutions

IOOF – Project Business Analyst (IT)   Dec 2015 – Nov 2016
Melbourne, VIC

- Established a performance reporting framework for the ClientFirst program for the Client & Process division
- Constructed dashboards for key stakeholders, and a data model to capture key metrics for the purposes of capturing relevant and accurate data for each business area

IOOF – Business Analyst, Data Reporting (Finance)   Dec 2015 – Nov 2016
Melbourne, VIC

- Oversaw the migration of the performance reporting function from the Research and Portfolio Construction team to Data Reporting, ensuring audit requirements were met within a strict timeframe
- Process automation of portfolio performance reporting-related tasks (VBA/macros/Solvexia/Morningstar)
- Collation and reporting of data relating to the IOOF Group for internal and external stakeholders including Asset Allocations, Investment & benchmark performance calculation, FUMA & Flows
- Conducted ad hoc data analytics/insights requests for Corporate tenders and campaigns, including customer segmentation, transactional and flows analysis
- Approver of Compliance controls management system, responsible for ensuring audit recommendations had been adequately addressed before presentation for internal audit

IOOF – Platform Custody Officer   Jun 2014 – Dec 2015
Melbourne, VIC

- Monitoring and processing of any listed security/managed fund distribution/dividend income and tax profiles
- Verification and updating of unit prices onto the platform funds
- Processing of the Automatic Investment Process, ensuring all investment instructions are cleared before fund manager cut-off times
- Processing of share trade requests to Bridges stock brokers and confirmation of share trade transactions in Orion and POL online
- Processing asset setups and maintenance requests
- Liaised with fund managers to establish accounts for new investment choices on IOOF's platforms
- Analysis of transaction reversals impacting clients' accounts, preparation of good value claims reporting for the Reporting team
- Processing Term Deposit breaks and performing monthly reconciliation of Term Deposits
- Dealing with ad hoc queries and investigations requested by Operations Team

IOOF – Platform Accounting Officer   Jan 2012 – May 2014
Melbourne, VIC

- Daily bank reconciliation of the major fund platforms IOOF Portfolio Service, IOOF Lifetrack Super, Superchoice clearing facility, and Overnight Processing reconciliation
- Liaised with internal shareholders for the investigation and resolution of operational, reconciliation or system issues
- Maintenance of the interface transaction codes and general ledger elements, and set up of new assets
- Assisted with month-end reporting and balance sheet reconciliations, preparation of reporting packs and general ledger journals
- Calculation and payment of PAYG, NRW and WHT tax, salary continuance insurance, retail insurance fees
- Facilitated banking duties including running daily Bpay, payments, Direct Credit and Direct Debit bulk payments, banking of foreign currency cheques, EFT/cheque refunds and transfer, cheque cancellation requests

i-LAN Technology Pty Ltd – Marketing Writer   Jun 2010 – Dec 2011
Melbourne, VIC/Sydney, NSW

Crown Casino – Mahogany Room VIP Stewardess   May 2009 – Dec 2012
Melbourne, VIC

BHP Billiton, Nickel West Stainless Steel Materials – HR Administrator   Oct 2008 – Mar 2009
Perth, WA

Blueprint Planning – Para Planner   Mar 2007 – Dec 2008
South Perth, WA

ANZ Bank – Service Consultant   Dec 2006 – Mar 2007
Morley, WA

LANGUAGE AND TECHNICAL COMPETENCIES

- Basic language proficiency in Mandarin
- Software and technical competency in:
  - Office suite - advanced MS Excel, MS Word, MS Outlook, MS Powerpoint, MS Access, MS Publisher, MS Visio
  - Data - SQL, MS Power BI, Tableau
  - Agile/Collaboration tools - JIRA, Confluence, Slack, Teams
  - UI/Wireframing – Axure, Figma, Balsamiq
  - Accounting/Reporting – Acurity, Orion/Oracle, GreenTree GL, , Seagate Crystal Reports, IBM Cognos, ASIS
  - Finance/Investment - Morningstar Direct, Bloomberg, PControl, Calastone, TAS
  - Financial Planning - COIN, Act!, Moneywise, Xplan
  - Programming – basic html, css, javascript, C#

REFEREES

References available upon request