

Andy Zhang

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EDUCATION

University of Waterloo

Honours Bachelor of Computer Science, Software Engineering

Waterloo, ON

Sep 2016 – Sep 2021

Wilfrid Laurier University

Honours Bachelor of Business Administration, Finance

Waterloo, ON

Sep 2016 – Sep 2021

WORK EXPERIENCE

Waratah Capital Advisors

Private Equity Analyst

Toronto, ON

Sep 2019 - Dec 2019

- **M&A:** Worked as a part of a two-person real-estate PE strategy; participated in all aspects of the deal process, from constructing LBO and CCA tax schedule models, to preparing presentations, analysis, and forecasts for board and investment committee meetings.
- **Management:** Improved and implemented processes across all portfolio resorts, such as digitizing leases and automating invoices.

Laurier Management Consulting Practicum

Pro Bono Management Consultant

Toronto, ON

May 2019 - Aug 2019

- **Consulting:** Developed a framework for assessing autism service delivery models and interviewed therapists from around the world to gather qualitative and quantitative insights.

CI - Cambridge Global Asset Management

Research Analyst

Toronto, ON

Jan 2019 - Apr 2019

- **Equity Research:** Forecast future performance of companies and reviewed investment theses with portfolio managers and analysts.
- **Portfolio Analysis:** Automated reports on numerous logistical benchmarks, such as market and geographic exposure of funds.

Sample Research Project:

- Developed a model and an investment thesis for a global convenience goods company, incorporating regulatory risks, and performed due diligence through interviewing IR and the CEO, as well as industry experts; valued company with a DCF and a comparable multiple.

University of Waterloo Mathematics Society

Vice President of Finance

Waterloo, ON

May 2018 - Sep 2018

- **Finance:** Administered the Operating Fund, as well as the Capital Improvements Fund, totaling over \$300,000.
- **Leadership:** Managed a team of 10+ Finance Directors to oversee the financial operations of the society.

Blackhawk Network

Marketing Analytics Intern

Toronto, ON

Jan 2018 - Apr 2018

- **Data Analysis:** Created and prepared reports and models, such as forecasting promotional sales, conducting post promotional analysis, and optimizing planograms; analyzed trends to determine why sales for certain under-performing products are stagnant.

China Merchants Bank

Corporate Banking Intern

Wuxi, JS

May 2017 - Aug 2017

- **Sales:** Contacted over 1000 corporate clients ranging from startups to multi-billion-dollar corporations.
- **Pitching:** Wrote, edited, and delivered sales pitches for new financial products, both in English and Mandarin.

OTHER EXPERIENCE

McKinsey Challenge

1st Place out of the 8 Teams Selected from over 400 Applicants

Toronto, ON

Oct 2019

- **Strategy:** Recommended a solution to a non-profit focused on expanding the Canadian technology economy.

JDC Central Laurier

Digital Strategy Delegate (Past: Parliamentary Debate Delegate)

Waterloo, ON

Aug 2018 - Apr 2020

- **Logical Analysis:** Compete and train in debate (BP and CP) and case analysis (focus on MIS cases).

Students Offering Support (SOS)

Economics Instructor

Waterloo, ON

Sep 2018

- **Teaching:** Prepared and delivered exam preparation sessions for the Introduction to Microeconomics course (EC 120); over 600 students attended the sessions, raising over \$12,000 towards charity.

Quantify Risk & Insurance Case Competition

2nd Place out of the 25 Teams Selected from over 200 Applicants

Waterloo, ON

Jul 2018

- **Risk Management:** Constructed models on climate change risk to recommend a risk mitigation solution.

OTHER INFORMATION

- **Relevant Courses:** Algorithms, Logic & Computation, Combinatorics & Optimization, Probability & Statistics, Economics, Financial Modelling (Marquee Group), Machine Learning (Stanford), Financial Engineering and Risk Management (Columbia), Deep Learning (deeplearning.ai)
- **Languages & Technical:** French (DELFB2 & French Immersion Certificate), Mandarin (Ontario Grade 12), C, C++, Scheme, VBA, MATLAB, R, Python (TensorFlow & Keras), SQL, HTML/CSS, Ruby on Rails, Shell Script, Git, Bloomberg, FactSet, CapIQ, EFX
- **Hobbies:** Deep Learning, Reading (investing, philosophy & Stephen King), Music (from Paganini to JAY Z), Staying Active (hockey & gym)