

Independent Project, Database Management Administrator Independent Project, Database Management Administrator Independent Project, Database Management Administrator - An Independent Investment Research Firm New York, NY Work Experience Independent Project, Database Management Administrator An Independent Investment Research Firm - New York, NY April 2019 to Present Discover and solve sync problems in Salesforce Pardot to improve data quality in CRM database Help monitor dashboards and generate reports accordingly to support business towards different audience Coordinate database developers with the needs from different parties, such as sales team to adjust the database methodology efficiently Analyst, Capital Markets Hongkun Real Estate Development Company - New York, NY January 2018 to Present In charge of setting up 2 parallel funds with structure of Reg S and Reg D for financing needs of a real estate project Liaise with onshore and offshore attorneys to draft private placement memorandums, limited partner agreement, investor questionnaire, loan documents and other related legal documents Work with Fund Administration regarding investors' AML/KYC background check, financial statements, tax return (K1), FATCA/CRS filing and quarterly NAV reports in compliance with regulatory Report to fund manager Weekly of the firm to support the full range of the funds from fund origination, due diligence and post-investment support Develop a model with excel to realize the comprehensive data visualization to understand the investor profiles for the purpose of management and operation of ~ \$30MM AUM to reduce the operation cost of a close-ended debt fund Analyze the capital stack of each property, and recommend a fund structure for that particular investment to optimize debt structure while meeting investor needs and the target IRR Business Development and Research Intern Visionary Access, Inc - New York, NY June 2017 to August 2017 New York, NY June 2017 - Aug 2017 An online networking channel targeting investors and entrepreneurs Business Development and Research Intern Analyzed 1000+ potential investment opportunities in Fintech Industry Conducted in-depth research and due diligence for investment projects using data-driven analytics and digital marketing approaches with the goal of improving company investment portfolio Managed investor and investee relationship and explored tailored investment opportunities using Salesforce CRM software and company proprietary models Project

Analyst, Team leader, Internal M&A Team Broadridge Financial Solutions, Inc - New York, NY
November 2016 to June 2017 New York, NY Nov 2016 - June 2017 A global Fintech leader
providing communication, technology, data and analytics advisory and solution Project Analyst,
Team leader, Internal M&A Team Analyzed best performing products of Broadridge within its main
business lines and conducted market research to understand product advantage and strategic
positions Analyzed the latest market trend for Global Technology Operation business, including
post-trading processing, global investment management, and studied over 100 Fintech companies
in post-trading processing area Generated due diligence reports of target companies including
current technology performance and integration Conducted M&A analysis and presented research
findings to the Board of Directors Assistant Dealer, Trading Department Aegon-Industrial Fund
Management Co., LTD - Shanghai, CN December 2014 to February 2015 Wrote daily stock trading
reports based on Wind and Finance China data to help inform future trading strategies; attended
morning meetings with trading team to learn forecasting strategies Verified critical client
information for administration of 50+ investor contracts, ensuring data quality and integrity Education
Master of Science in Global Finance Fordham University, Gabelli School of Business - New York,
NY September 2016 to December 2017 Bachelor of Science in Information and Computing Science
Fudan University, School of Mathematical Sciences - Shanghai, CN September 2012 to June 2016
Skills Sql, C++, Python, Vba, Matlab

Name: Michelle Mccoy

Email: yray@example.org

Phone: 001-357-642-1041