

Annie Zhao

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EDUCATION

The University of Texas at Dallas

December 2026

Bachelor of Science, Finance

GPA 3.77

PROFESSIONAL EXPERIENCE

Bank of America, Dallas, TX

May 2025 – August 2025

Global Operations Summer Analyst

- Audited 63 Small Estate Affidavit enclosures using state legal codes, analyzing in Excel; proposed a solution reducing regulatory risk across all 50 states and trained 4 analysts to implement it with the legal team
- Compiled and analyzed 30+ Estate Services complaint calls from Nexidia and the Complaint Tracking and Resolution tool, enabling Front Line Unit managers to improve training processes and decisions
- Trained 20 Client Experience (CE) teammates to use Microsoft Teams, supporting the company-wide migration from Skype for Business; created a reusable training deck deployed across Dallas, Phoenix, and Charlotte offices
- Designed a volunteer trivia tournament to strengthen team cohesion within the newly formed CE team across 7 states, virtually hosting 23 teammates and 10 onboarding analysts; provided event template to Bank
- Recognized with 2 Silver Awards from Client Experience Executive Brandy Voels for audit and team-building projects

Corpine Fulfillment, Dallas, TX

May 2020 – December 2024

Marketing Analyst

- Researched consumer involvement in buying tech accessories, collecting data from 12,700+ Amazon reviews and surveying 5 retail stores for customer experiences; created Amazon A+ content for 3 top-selling TV mounts
- Wrote 20 instruction manuals, photographing products and designing graphics in Adobe Photoshop

Four Seasons Hotels and Resorts, Vail, CO

June 2022 – August 2022

Hospitality Intern

- Worked 40 hours/week as a fine dining server while learning hotel operations with Vail's executive team; personalized dining experiences by memorizing customer names, breakfast orders, and service preferences
- Identified opportunities for new dishes after observing customer demand, creating a Peach French Toast with the head chef and selling 26 plates during the 2-day special; won a free breakfast for making the most sales

ORGANIZATIONS & CAREER DEVELOPMENT

Finance Leadership Council (FLC), UT Dallas BS Finance Program, Director of Mentorship

April 2025 – Present

- Restructured the Mentorship Committee, managing team of 5 to serve as academic liaisons to the Finance Program
- Created peer tutoring and advising programs for finance majors, training volunteers and writing reference guides to serve students in 14 events per semester; set up virtual meeting and event space for finance students on MS Teams

Undergraduate Dean's Council (UGDC), UT Dallas School of Management, Marketing Team

January 2025 – Present

- Marketed the Dean's Cup trivia tournament, attracting 56 participants by tabling and Instagram marketing
- Planned and executed a Welcome Social, hosting 60+ business students during the 2025 Weeks of Welcome

CLDS x AKPsi Case Competition, UT Dallas Consulting and Leadership Development Society, Finalist

April 28, 2025

- Collaborated with 2 teammates to present a 10-minute proposal for fintech budgeting app FinBud, developing a retention strategy to reduce churn rate with UX improvements and onboarding redesign
- Advanced to finals as one of 5 of 35 teams, presenting recommendations to judges from PwC and Capital One

Financial Executive Experience, Financial Executives International & Frost Bank, Mentee

October 2024 – April 2025

- Mentored by a Dallas CFO and built professional network with 30 peers and local industry leaders
- Awarded \$1,000 scholarship upon completion of mentorship sessions and Frost Bank's Financial Literacy Program

PNC Leadership Series: EmpowHer Brilliance, PNC Bank, Invitee

December 5-6, 2024

- Chosen from 900+ applicants as one of 40 invitees to the PNC Leadership Summit at headquarters in Pittsburgh; advanced to an on-the-spot interview for PNC's Corporate Analyst internship

ADDITIONAL INFORMATION

Technical Skills: R (programming language), Tableau, Microsoft Excel, Amazon A+ Content, Adobe Photoshop, Adobe Illustrator, Adobe Premiere Pro, AI Prompting, Canva

Eligibility: US Citizen, eligible to work in the US for internships and full time with no restrictions