

Zhi (Simon) Li

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Education

Pace University

New York, NY

M.S. Investment Management, GPA: 3.52

Sep 2012 – Dec 2014

- Coursework: Financial Accounting, Corporate Finance, Data Analysis (Excel), Fixed Income Markets and Analytics, Portfolio Analysis, Valuation of Firms, Derivatives Investment
- Teamwork: ACG M&A Competition, Pace University Trading Competition

Guangdong University of Business Studies

Guangzhou, China

B.S. Applied Mathematics, GPA: 3.6

Sep 2008 – May 2012

- Coursework: Mathematical Analysis, Higher Algebra, Principles of Database, C/C++ Programming, Probability Theory, Mathematical Statistics, Stochastic Process
- Honor: Scholarship of College of Mathematics and Computer Science (2010)
- Mathematical Modeling Competition of College of Mathematics and Computer Science

Experience

Northwestern Mutual, 245 Park Ave

New York, NY

Financial Services Intern

May 2015 – Present

- Prepared Personal/Business Planning Analysis report for clients
- Generated personal investment portfolio reports through MorningStar and Envestnet programs
- Researched over 500 prospects' profiles via LinkedIn and NM's CRM system to facilitate financial advisor in expanding clientele
- Aided in organizing ad hoc financial seminars hosted by financial advisor

King & Wood Mallesons Law Firm

Guangzhou, China

Intern, Securities and Capital Markets Department

May 2013 – Aug 2013

- Translated documents from Chinese to English concerning merge and acquisition issues for an Australian investment bank
- Conducted legal research for associate lawyer
- Assisted associate lawyers in reviewing clients information, including contracts, leases

Nanyang Commercial Bank

Guangzhou, China

Corporate Finance Intern

Jan 2012 – April 2012

- Analyzed and reviewed financial statements of clients to monitor the clients' financial health
- Assisted account managers in processing transactions, ranging from 5 million to 30 million RMB
- Collected registration information from the State Administration of Industry and Commerce for the loan applications' review
- Conducted due diligence for small business clients

Computer and other skills

- Technical: Advanced Excel skills (pivot table, vlookup, index/match etc.), Bloomberg, basic VBA.
- Language: Fluent in English, native in Cantonese and Mandarin

Leadership

Director of Academic Development of Graduate Finance Club, Pace University

Dec 2012 – Dec 2013

- Organized a 3-month investment competition with 50 participants in fall semester 2013
- Explored alumni resources and held multiple events for finance students at Pace

Personal Interests

Violin, Trombone, Guitar, Drum, Basketball, Soccer, Table Tennis