

EDUCATION

Fordham University

Bronx, New York, United States

BS in Finance (Concentration in Value Investing and Minor in Mathematics)

Class of 2015

- Major GPA: 3.4 / 4.0
- Relevant Coursework: Financial Management; Corporate Financial Policy; Investment & Security Analysis; Portfolio Management; Financial Modeling; Value Investing; Behavioral Finance

ENTREPRENEURSHIP

Meigushijie.com (Shares World) is a platform that provides Chinese investors U.S. stock information, market news, and stock investment education in Chinese, and also offers a forum to facilitate investors to communicate investment ideas. The ultimate goal is to attract Chinese clients to open stock accounts at Viewtrade.

- Designed and built the Meigushijie.com to serve the Chinese investors with U.S. stock information, stock recommendations from local experts, financial news, and investor's forum in Chinese
- Managed the financial costs through recruiting and leading 6 Chinese interns; advertised website with social media

WORK EXPERIENCE

Weitian Group LLC

New York City, NY, United States

Investor Relations Intern

December 2015 – Present

- Assist with the creation and editing of clients' investor relations materials including press releases, corporate presentations, and company descriptive materials
- Update the investor presentations on a regular basis including macro economy, industry and company specific analysis and estimate changes with the internal financial model and sell-side research

Viewtrade Holding Corporation

Jersey City, NJ, United States

Finance Intern

March 2013 – February 2014

- Performed independent research on a Chinese microcredit company's IPO by reviewing its business model and scrutinizing its financial statements
- Worked as an interpreter for Chinese clients for investment meetings

The Bank of East Asia (China) Ltd., Zhuhai Branch

Zhuhai City, Republic of China

Summer Analyst

May 2012 – June 2012

- Researched the implication of monetary policies on the lending business sector
- Proactively monitored the creditworthiness of assigned clients
- Interacted with clients to help ensure that the information flow from the client to the audit team is efficient and accurate

Liang Zi Jin Investment Consulting Center

Beijing City, Republic of China

Chairman Assistant

February 2011 – April

2011

- Provide feasible solutions to clients by conducting equity research against the backdrop of regulation changes
- Retained and expanded relationships with clients by creating financial solutions to meet their goals
- Identified undervalued companies based on absolute and relative valuation models

ADDITIONAL EXPERIENCE

Study Tour of Turkey – Financial Modeling of Emerging Markets

Turkey, March 2014

- Travelled to Istanbul and learned about its culture, religion and financial market
- Communicated with local analysts to study Turkey's economy growth and politics concerns
- Researched on a Turkey household appliance company and advised school fund to invest

SKILLS

- **Computer:** MS Office, Bloomberg
- **Language:** Native Speaker in Chinese Mandarin
- **2015 CFA Level 1 Candidate**