

KONG CHEN

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EDUCATION

Zicklin School of Business, Baruch College, CUNY

New York, NY

Bachelor of Business Administration - Expected Graduation Date: July 2013

Major: Finance **GPA:** 3.1 **Major GPA:** 3.4

Awards: Outstanding Tax Preparer Award, IRS Certified Basic Tax Preparer

WORK EXPERIENCE

Moody's Corporation

New York, NY

Associate Billing Intern

January 2013 – Present

- Prepare and format Profit & Loss and Balance Sheet statements for Latin American entities on a monthly basis
- Conduct financial research on various clients to verify with NRSRO and ESMA compliance requirements
- Record and forecast department travel and temporary-hire budget expense reports
- Generate invoices on internal billing software such as Pyramid and Phoenix
- Compile billing and invoicing documents to be included in the GMO SharePoint site and ensure it is maintained
- Manage and facilitate weekly meetings for nine Senior Billing Management members

International Fund Services, A State Street Company

New York, NY

Fund Accounting Intern

March 2012 – Present

- Update Anti-Money Laundering (AML) Checklists to verify investors are qualified for payments
- Review and book subscription, redemption and transfer transactions ranging from \$50,000 to \$3 million
- Record over 50 hedge funds' transactions on company's cash logs on a daily basis
- Assist with filling audit confirms from various Public Accounting firms
- Complete FINRA's "New Issue" Questionnaires for new investors
- Provide administrative support for a team of 40 Fund Accountants

Lin's Restaurant

Brooklyn, NY

Manager

October 2009 – January 2013

- Looked for cheaper, faster and higher quality suppliers through the internet which cut down expenses by 15-18% yearly
- Hired, trained and motivated part-time cashiers and waiters
- Managed restaurant operations through inventory control, budget handling, and customer relations
- Supervised a team of four co-workers

Peking Garden

New York, NY

Cashier

June 2003 – September 2008

- Provided excellent service by quickly fulfilling customers' needs
- Handled over \$1,000 in cash and credit transactions daily

LEADERSHIP

Baruch V.I.T.A. (Volunteer Income Tax Assistance)

New York, NY

Assistant Coordinator/Officer

June 2012 – Present

- Design and execute volunteer recruitment strategies and assist with program operations
- Co-operate with a team of 16 to revise the tax textbook with updated tax regulations
- Provide training to 100 prospective volunteers to facilitate understanding of Federal and NY State taxation principles
- Manage a tax preparation site by overseeing 10 Volunteers
- Review completed tax returns for accuracy and completeness before sending to the IRS

Volunteer

January 2012 – April 2012

- Prepare and file clients' federal and state tax returns in accordance with tax legislation and regulations
- Answer various tax related questions in Mandarin and Cantonese

ADDITIONAL

Skills: Financial Research, Bloomberg, Reuters, Microsoft Word, Excel (Pivot tables, VLOOKUP), Outlook, PowerPoint, ISS, SAS Programming, SharePoint, Phoenix, Pyramid, Photoshop

Languages: Fluent in Chinese Mandarin and Fujianese, Conversational Cantonese

Interests: Stocks, Reddit, Traveling, Biking, War History, Video Games, Basketball, Piano