
Education, Honors and Research Projects**University of Rochester****Rochester, NY***Bachelors of Arts in Financial Economics and Bachelor of Science in Applied Math**Anticipated May 2015*

- **Cumulative GPA: 3.76;** Dean's List 7 of 7 Semesters; \$10,000 Annual Dean's Scholarship; and National Society of Collegiate Scholars
- Math Teaching Assistant Spring 2012 and Spring 2014, Financial Mathematics Teaching Assistant Fall 2014
- *Relationship Between Real GDP and Aggregate Economic Variables:* investigated relationship between real GDP and aggregate economic variables by applying Excel and government bureau statistics
- *The Effect of Birth Order on Children's IQ:* conducted Regression Analysis on the effect of birth order on children's IQ by using STATA, controlling variables such as gender, mother's employment status and real wage
- *Test Simple Momentum:* used MATLAB to analyze different phenomena of market anomaly and investment strategies to exploit market inefficiencies such as momentum strategies and long run reversal

Investment Banking Institute**New York, NY***Investment Banking Analyst Training Program Participant**June 2014*

- Completed intensive 4-week financial modeling training program, conducted ratio analysis and Comparable Company Analysis by calculating TEV, LTM, TEV/EBITDA and P/E ratio using financial statistics from different sections of 10Ks and 10Qs
- Built fully integrated cash flow financial model, performed DCF analysis by calculating Terminal Value, created Leveraged Buyout and M&A models by calculating purchase price and equity value using Accretion Dilution model

Finance and Analytics Experience**Matrix Partners****Hangzhou, China***Venture Capital Intern**August-August 2014*

- Attended training sessions on financial modeling and completed models for a chemical company using FCF valuation
- Analyzed the securitization of P2P lending and discussed investment opportunities and risks in P2P industry
- Drafted full-blown due diligence reports for potential companies in various sectors ranging from high-tech to fashion-forward

National Securities Corporation**New York, NY***Financial Management Intern**June-August 2014*

- Participated in financial seminars and management tutorials led by senior executives and did daily morning briefings for US stock market
- Conducted in-depth research and pitched presentations for TMT sector stocks covering investment highlights and risks and valuation metrics
- Maintained due diligence database on client contact lists and analyzed financial data from the latest analyst reports
- Provided high net worth clients with deep insight in investment strategies based on individual needs and goals and successfully generated over 100 leads from individual and institutional investors

Meliora Capital Management LLC**Rochester, NY***Financial Analyst**September 2013-May 2014*

- Performed fundamental analysis then made pitch buy/sell recommendations for student managed investment portfolio of \$30,000+
- Conducted qualitative and quantitative research and present monthly detailed analytical stock reports and recommended portfolios by looking at debt-to-equity ratio, market snapshot, Beta value, government policy implications
- Did presentations on TMT and consumer sectors including DDD printing companies, Gladstone Commercial, Coach Inc. and TripAdvisor

HSBC Private Bank**Shanghai, China***Summer Intern**June-August 2013*

- Attended internal training and conducted in-depth research on asset allocation strategies and market dynamics affecting investment decisions
- Presented fund pitches to management team covering market snapshot, past performance, investment style and risk threshold and provided deep insight on investment strategies tailored to high net worth individuals
- Set up client meetings and maintained relationship management data to update client contact data and maintain effective working relationship
- Worked with clients to identify needs and then develop personalized solutions by recommending products and wealth preserving strategies

Collegiate and Community Co-curricular Leadership and Competitions**University of Rochester****Rochester, NY***Rochester Billiard Club and Winner Rochester 2012 Billiard Championship**September 2011-present**Refugee Students Alliance Program Team Leader**September 2011-present**UR Entrepreneur Executive Board Member**September 2011-present**Model United Nations, Facilitator (Outstanding delegate in Cornell International Affairs Conference)**September 2011-present**New Oriental Language School TOEFL, IELTS, and SAT Tutor**June-August 2012**Conservation Volunteer in Melbourne, Australia Team Leader**January 2013**International Youth Leadership Summit and Business Strategy Competition Team Leader and Best Idea of 2013 Winner**July 2013*

Technical and Language Qualifications and Interests

- Equity Research, DCF, Comp Spread, Financial Statement Analysis, LBO, M&A and Integrated Cash Flow Modeling
- Microsoft Word, Excel, PowerPoint, STATA, MATLAB
- English and Mandarin fluency and experience working in bilingual environment
- Semi-professional Billiard player, Intramural Basketball player, Travelling, Harmonica, Volunteering