Haining (Kate) Jiang

229 9th St, Apt 201, Brooklyn, NY 11215

(917)941-5101 | jhhnnn@hotmail.com | www.linkedin.com/in/katehjiang

Professional Experience

Data Analyst | Current
Rox Systems Inc | New York, NY

- Manage and develop multiple projects with different levels of priorities from internal and external users
- Materialize user requirements as solution specialist to automate complex manual reconciliation into robotic procedures
- Bridge compliance reporting requirements on trading data from regulators and counter-parties into program that limits error rate below 0.05%
- Analyze trading data upon business inquiries by querying millions of records in MS SQL
- Design Corporate Action reporting database under DTCC specification to track customers' position and income
- Customized client reports with SQL stored procedures that communicates daily with SFTP server
- Optimize data model and tune SQL scripts to improve efficiency from hours to minutes
- Re-design commission structure to generalize trading fee, which doubles profitability
- Translate data from web source by parsing files in different format with PowerShell
- Enhance and support applications for domestic and non-resident customer tax reporting in SSRS
- Administer database servers to ensure reliability of backup, restore and ETL processes

Tax Analyst | Jan 2017 - May 2018
Morgan Stanley | New York, NY

- Performed Robotic Testing for automation on 1042S Exception Report, provided automation procedures and QA testing on parallel check-out
- Provided training to and oversaw new hires to support daily tasks including documentation, compliance and reporting
- Supported Morgan Stanley Service Network under Client Tax Reporting Department, including W8/W9 instruction, withholding inquiries, 1042S and 1099 information reporting, B-Notice and C-Notice guidance
- Worked on Compliance Project: US T-Bill and foreign CUSIP, W8 Reopen Report, and 1042S Exceptional Audit Report, Reject Report, Control Report
- Researched causes of improper tax withholding and guided IT to block/charge withholding by CUSIP or account
- Reported investment income and tax withholding for 1099 filing, extracted 1042S detail report, and analyzed securities affected by income reallocation and foreign tax gross-up process

Tax Analyst | Aug 2016 - Oct 2016
Anchin, Block & Anchin LLP | New York, NY

- Prepare tax filing documentation for clients to ensure timeliness and accuracy

Skills

Programming: C#, T-SQL, Python, VB, C++, R, ShellScript
Data Analytics: Tableau, SSRS, Pandas, Numpy, Excel, Access
Big Data: AWS, Cloudera, SparkSQL, HDFS
Language: Mandarin & Cantonese (Native), English (Fluent)

Education

Baruch College - City University of New York | New York, NY

M.S. in Information System - Data Analytics | May 2019
GPA: 3.75/4.0
M.S. in Accounting | May 2016
GPA: 3.86/4.0
Beta Gamma Sigma Academic Honors

Guangdong University of Foreign Studies | Guangzhou, China

B.S. in Economics | July 2014
GPA: 3.44/4.0
Integrated Excellence Scholarship; Academic Honors
Academic Honors: 2012, 2013
Leadership: Drama Competition, Director; TGC Model Team, Vice President
Exchange Program: Columbia University, GPA: 3.77

Projects

Business Analysis with Tableau

- Visualized marketing data in tableau to present business insights between purchases and customer characteristics
- Mapped data to show changes over time geographically

Data Analysis with Spreadsheet

- Implemented Python Pandas to parse raw data from NYC Open Data to pre-screen desired data
- Established trend analysis in spreadsheet to visualize data using 3D Map, Pivot Table, VBA Macro, Histogram and Regression

Database Development with SQL

- Designed a E-R model with UML notation for auto insurance company to manage policies holders and damage claims
- Normalized the E-R model to improve conciseness and performance and built the database structure in Access using SQL
- Imported data and run SQL queries to identify patterns in damage claim, in order to improve policy design and profitability

Trend Analysis for Investing Instrument with Python

- Developed Pandas and Numpy to parse web data for various investment instrument: stock, gold, oil, bitcoin, etc.
- Transformed unstructured data into comparable format and executed regression analysis between the objective data and SPY500