

Daphany Wang



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<https://github.com/daphany>

Experience



Associate

Prometheus Private Advisory Group

May 2017 - Present (3 years 5 months +)

- Consult with clients to determine financial needs analysis and construct a financial plan to achieve their financial goals utilizing investment, insurance, and credit banking products
- Keep track of clients' personal and financial updates and continuously build client relationship
- Promptly resolve client issues and answer finance-related questions
- Manage clients' portfolios and coordinate portfolio reviews with clients to regularly evaluate investment's performance toward achieving long term financial goals



Flight Attendant

Air Canada

Jan 2020 - Jun 2020 (6 months)

- Ensure customer safety and comfort on each flight, and share ways to improve the customer experience with management.
- Communicate effectively with flight crews to ensure all safety and service-related items are adhered to for an overall positive flight.
- Administer and coordinate emergency procedures or provide emergency care, as needed.
- Participate in preflight briefings and in-flight responsibilities.

Education



University of Toronto

Data Analytics

2020 - 2020

Data Analytics Boot Camp

- Advanced Excel: VBA scripting, Vlookup, What-If Analysis, Pivot Tables
- Statistics Modelling
- Python programming: Python 3, NumPy, Pandas, Matplotlib, API interactions, Beautiful Soup
- Databases: MySQL, MongoDB, ETL
- Web visualization: HTML, CSS, JavaScript, Bootstrap, Dashboarding, D3.js



McGill University

Bachelor of Science - BS, Food Science and Nutritional Science

2010 - 2015

Licenses & Certifications

Life License Qualification Program - Insurance Council of BC



Canadian Securities Course - Canadian Securities Institute (CSI)

Skills

Python (Programming Language) • JavaScript • Microsoft Excel • Data Analysis • Insurance • Financial Advisory
• Customer Service • Cascading Style Sheets (CSS) • HTML