**Daphany Wang**

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**SUMMARY**

* Motivated and detail-oriented data analyst with hands-on experience in data manipulation, data visualization and machine learning.
* A fast learner and adaptive team member with strong problem-solving skill, producing excellent work and collaborating well to achieve group performance.
* Deadline driven, organized, and practiced at juggling multiple competing priorities.
* Strong communication skill with ability to act as liaison between clients, stakeholders, and third-party institution
* Technical Proficiencies: MS Excel (Advanced), SQL, Python, VBA, Tableau, Power BI, Google Analytics
* **EDUCATION**
* **Data Analytics Boot Camp Certificate** Jun 2020 - Dec 2020
* University of Toronto, Toronto, Ontario
* A 24-week intensive program focused on gaining technical programming skills in Excel, VBA, Python, R, JavaScript, SQL Databases, Tableau, Big Data, and Machine Learning
* **Bachelor of Science** Sep 2010 - Aug 2015
* McGill University, Montreal, Québec
* Concurrent degrees in Nutritional Science and Food Science
* Relevant Courses: Statistics, Microeconomic, Macroeconomic, Management Theories& Practices, and Calculus
* **CERTIFICATE**
* **Canadian Securities Course (CSC)**
* **Advanced Google Analytics Certification**
* **Intermediate SQL Certification (Data Camp)**
* COUNT, GROUP BY, ORDER BY, JOIN, CASE WHEN, DISTINCT, SUBQUERY, CTE, and Windows functions
* **Tableau 2020 Training for Data Science & Business Analytics (Udemy)**
* **Master in Microsoft Power BI Desktop and Service (Udemy)**

**WORK EXPERIENCE**

**Financial Advisor/Data Reporting Analyst** Mar 2017 - Nov 2020

Prometheus Private Advisory Group • Vancouver, British Columbia

* Collaborate with management team to determine their business needs and requirements
* Analyze clients’ financial situation and create clients’ summary dashboard (advanced **Excel** includes Pivot Table, Conditional Format, Charts, Index and Match)
* Collect and interpret data from CRM system to produce sales reports and ad-hoc report
* Produce internal sales dashboard and KPI report to identify sales patterns and trends (**Power BI**, Dax functions, Power Query)
* Perform annual customer analysis to optimize marketing strategy (**Tableau**)

***Key Accomplishments:***

* Accelerated clients’ savings by 30%-50% by utilizing tax-efficient leverage strategies
* Increased company revenue by 100% from 2018 to 2019
* Centralized back office process by establishing various excel templates, and improved efficiency by reducing manual reporting 5 hours a week
* Charted administrative process and trained new advisor assistants

**Financial Advisor** Sept 2015 - Mar 2017

FS Financial Strategies • Vancouver, British Columbia

* Meet with clients and perform assessment of a problematic situation
* Collect information about the client’s through KYC, business documents and tax filing
* Analyze and interpret data to unearth problems, and comprehend the causes
* Design a financial plan and provide sound and professional financial advices to achieve their financial goals utilizing investment, insurance, and credit banking products
* Assist the client in implementing the plan and resolve any problems and issues by acting as liaison between clients, insurance companies and banks
* Monitor the financial market by staying up to date on national and international current events such as policy changes, tax rules, company quarterly earnings report and etc

**PROJECTS**

**KPMG Data Analytics Virtual Internship** **|** https://github.com/daphany/KMPG-Virtual-Internship

* End-to-end data analysis from ELT, data manipulation, analysis to data visualization. Performed Customer RFM analysis to identify the most valuable customers. Created a **Tableau** Dashboard to summarize the findings.
* Tools used: **Excel** (Filter, V-Lookup, Pivot Table), **Python3 (Pandas)**, and **Tableau**

**Ames House Price Prediction |** https://github.com/daphany/Ames\_House\_Price\_Prediction

* ELT, data cleanups, built a Multiple Linear Regression model and Deep Learning Model to predict house price in Ames
* Evaluated the R2 score, Mean Square Error and model runtime
* Created a Tableau dashboard to display the data and machine learning result
* Built an interactive website for user to input data to run the house price prediction
* Tools used: **Python3, Tableau, JavaScript, HTML, AWS Database**
* **LANGUAGE**
* **Mandarin (Fluent)**