Tax *(continuing)*: H&R Block Academy 2022 Tax Course, Intuit Academy Tax

Tech: Adv.Access & Excel, VBA, SQL, (working:Python, web, MSSQL Server, PowerBI & PowerQuery) Jupyter Notebook, Anaconda Spyder, VSCode, GitHub, Co-Pilot, ChatGPT, BingGPT4,...

Certifications: IRS VITA 2023 Advanced Exam, CPA (inactive), NYS Notary Public

VOLUNTEER

NON-PROFIT

Volunteer Income Tax Assistance (VITA)

- Interviewed, prepared and quality-reviewed 30+ returns for qualified-income, disabled, elderly and/or limited English taxpayers; Mandarin & Cantonese translation ~HSK 4-5.
- Highlighted as MCC Changemaker April 2023 community newsletter.

PROFESSIONAL

COMPANY
Business Analyst Developer (independent)

Led global COO & HR teams in DevOps cross-improvement projects to create impactful solutions bridging business-IT process gaps to dashboard insightful KPIs for executive stakeholders in time-critical negotiations.

Compensation
- Automated robust end-to-end reporting touted for 'click-a-button' turnaround, rich in-depth detailing & zero-error accuracy.
- Ideated efficient solutions like Excel constraint solver to optimize variable values.
- Wrangled 20k+ record data sets and 350+ spreadsheets coding algorithms to resolve variants.
- Leveraged design-scalability to urgently support former teammates alongside current duties.

Performance
- On-demand seamless visuals 'at-a-glance' for 300+ bankers integrating disparate data sources.
- 'Quick-hit' solution built in 4 days, sustainable 4 years supporting global committees.
- Enhanced 360° intranet with real-time metrics; streamlined time-cost savings >50%.
- Innovated 'top of wish list' database utility for Extract-Transform-Load (ETL) upload to Word.

Talent Management
- Color-coded decision trees to ease data-analyses and enrich review processes for 35 CIO councils.
- Fastest unprecedented reporting (2 days to 2 hrs) to 7 global business units.

COMPANY
Business Analyst Developer

Upgraded IT operations at family-run tax accounting business, assisted office duties & trouble-shooting.
- Dynamic Excel-customized CRM - payroll tax compliance system for SME clients.
- ER-schema 3rd normal to manage 225 clients & 1.5k taxpayers; achieved 85% system footprint savings.
- Friendly GUI enabled with VBA, SQL, MSQuery, Pivot tables, MailMerge & AutoDialer.

COMPANY
Senior Consultant, Management Solutions

Team leader on client JDEdwards ERP CFO-team best-practice implementations.
- Analyzed organization alignment, value-chains and behavioral drivers.
- Supervised and mentored 5 teammates.
- Special: M&A due-diligence, DCF projections, eCommerce research, vendor alliances cost-benefits, and client survey benchmarking.

Senior Consultant

Tax and financial analyses of foreign universal banks.

- Assisted offshore tax structure analyses to improve US & Euro bank operating economics.
- Benchmarked interest rate yields on client loan portfolios.
- Helped review hedging tax treatment and DCF & OID on Brazil's 1992-94 LDC debt restructuring.
- Liased with Capital Markets and International Tax groups on IRS mark-to-market derivative valuations and swap-contracts transfer pricing projects.

COMPANY

Consultant / Developer

- Contracted by company to help automate foreign bank tax compliance practices.
- Improved productivity 70%. in payroll tax compliance redesign for SME clients using Lotus macros.

COMPANY

Tax Associate

- Supervised and trained accounting staff of Singapore's largest commercial and merchant banks.
- Modeled bank asset-liability duration gaps, US branch P&L effectively-connected income and E&P calculations for Euro financial company.
- Tax compliance: REMICs, CMOs, mutual fund RICs, securities partnerships, broker-dealer/traders.

EDUCATION

Self-Study (AI & ML path)

MITx: Analytics Edge (91%)	Intro CS & Programming-Python (99%)
Intro Probability-Science of Uncertainty (84%)	Intro Computational Thinking & Data Science (96%)
Stanford: Machine Learning (95%)	HarvardX: Using Python for Research (99%)
ColumbiaX: Analytics in Python (91%)	Microsoft: JavaScript, HTML5 and CSS3 Web Dev. (98%)
GitHub: web scraper	Kaggle: SQL Scavenger Hunt – Google BigQuery Datasets kernels

Kaggle 5 day regression, 5 day (linear & logistic?) ...Data Cleaning Challenge: Scale and Normalize Data

Analytics Vidhya: NN

Diploma

Business Programming & Web Development Diploma (GPA: 99.1 / 100)

Academic-year training in client-server architecture & object oriented web programming.

University

MBA Finance & Management / International Business (scholarship)

BS Accounting (Dean's honor rolls, Trustee & NYS Regents scholarships)