

ACADEMIC BACKGROUND

B.A. Major in Financial Economic
Western University (UWO)

Sep 2015 - Feb 2020
London, ON

SUMMARY OF QUALIFICATIONS

- Experience in developing Key Performance Indicators, performing variance analysis and management reporting
- Experience in VBA, Tableau, SQL and hands-on experience in large dataset management and business process review
- Excellent time management and problem-solving skills to conduct data research and business negotiation strategies
- Extremely well organized with superb attention to detail, innovative thinking and strong interpersonal skills

PROFESSIONAL EXPERIENCE

Associate

Mar 2018 - Sep 2019

Just Order Enterprises Corp. (Startup Food Delivery App)

London, ON

- Developed core competitive advantages to foster consumer loyalty by tailoring marketing campaigns towards target customers and researching on competitors' business strategies
- Established and led a regional operation team of 20, with responsibilities ranging from design of KPIs, recruiting, to training new hires
- Optimized the delivery schedule with data analytics to improve route efficiency
- Streamlined business processes to reduce the order processing time by 12+ mins
- Revamped the marketing strategy by sponsoring student clubs and creating special promotion events, which increased market share by 10+%
- Established and further expanded the vendor network by nurturing symbiotic relationships

Financial Service Representative (Intern)

May 2017 - Sep 2017

ICBC Bank (Asian Top 5 Commercial Bank)

Qinhuangdao, China

- Recommended different types of bank accounts based on the client's account profile
- Promoted the bank's digital applications by marketing the self-serve options to customers in branch
- Promoted financial products (mutual funds and GICs) by personalizing investment recommendations based upon the client demographics, risk appetite and financial profile
- Provided detailed commentary on client's preferences with the communication at branch when booking appointments with financial advisors
- Supported daily operations including processing deposits, withdrawals, bill payments and appointments

EXTRACURRICULAR & ACADEMIC ACTIVITIES

J.P. Morgan Commercial Banking Virtual Experience

Oct 2020

- Produces an Analyst Report providing acquisition recommendation on a healthcare product company
- Conducted a Discounted Cash Flow Model analysis, by forecasting 10-year cash flows with information on upcoming projects and historical balance sheet financials
- Researched the competitive advantages of the company's business model with Porter's five forces framework
- Analyzed the equity ownership structure and cost of acquisition by preparing the Capitalization Table
- Highlighted key (strategic, transitional and financial) risks and recommended potential risk mitigation strategies
- Determined the covenant structure and prepared the deal structure

KPMG Data Analytics Virtual Internship

Sep 2020

- Developed an interactive dashboard for a sports equipment company, displaying the trends of revenue-related metrics to assist in business decision making
- Assessed data quality with data exploration and cleaned data issues
- Summarized and visualized the data statistics with VBA and Tableau codes
- Interpreted the results to understand the trending consumer preferences and behaviors
- Provided business and marketing recommendations in catering to the target customers

Sentiment Analysis in Python

Oct 2019 - Nov 2019

- Performed a sentiment analysis on the top 3 box office movies, by analyzing the Twitter comments from individual audience
- Created the program to extract keywords from comments and transform them into data dictionaries

Feasibility Study (Finance Project Lead)

Mar 2018 - Jun 2018

- Prepared company profiles demonstrating the debt capacity of an e-commerce company in application of loan
- Presented in the company pitch and won the best pitch in the competition
- Projected the revenue and positive future performance by building a model and conducting a ratio and trend analysis
- Highlighted various risk mitigation strategies in place, particularly debt management