

VINCENT JIA

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Proven Strong Accounting, Financial Industry Background | Data Manipulation | Reporting & Dashboard Design

- 1 - Excellent accomplishment on **Budgeting, forecasting, strategic planning, CRM, marketing and risk management**
- 2 - Proficient in **Salesforce, Excel, SQL, Power BI, Data Model, Data Quality, Master Data Management, DW & Data Specification**

PROFESSIONAL BACKGROUND

Member Experience Specialist (FULL-TIME) | OMERS, Toronto ON | November 2019 - Present

- Collaborated with stakeholders from Capital Market, services & IT teams to support business expansion & technical infrastructure optimization, led initiative solutions in data manipulation, mining and data visualization process
- Led BI team to create enterprise level Power BI dashboard to provide Executive and Operational level of information acquisition with User story flow, KPI determination, Metric Design and Layout Requirement clarification
- Conducted pension data validation, reconciliation & consolidation process and revealed data gaps with business and IT team to build up robust data governance steps to support long term data management strategy
- Identified changes to business process by executing SQL queries for routine and Ad hoc data findings, prepared database semantic layer logic for analysis and reporting Infrastructure design
- Analyzed and grasped client core demands quickly; Well-prepared with explicit program scope, objectives, and deliveries for every client meeting; 0 complaints records backed by recognized client-management skills

Financial Analyst (CO-OP) | Et Al. Toronto ON / January 2019 - April 2019

- Spearheaded the migration of all processes and data from WaveApps to QuickBooks with no disruption to service
- Leveraged strong interpersonal skills to collaborate effectively with stakeholders in gathering business requirements
- Complied monthly financial position reports from data extraction, reconciliation, to result presentation
- Strictly adherent to Enterprise Risk Management guidelines in handling sensitive data
- Established and presented to senior management an internal control practices framework utilizing solid documentation, presentation, and communication skills

Data Analyst (Contractor) | EDPYPF Inc. Toronto ON / May 2018 - Aug 2018

- Analyzed industry trends and customer data in SQL database and validated the data integrity gaps
- Prepared ad hoc and ongoing Power BI reports for clients, demonstrated POC with Tableau & Excel
- Simplified the business process by introducing technical solution to reduce duplicated Excel Reporting work
- Monthly Financial income statement report automation process design and development
- Data Quality analysis, summarized the method to resolve duplication issue in data warehouse
- Transformed and loaded raw data between MS Access and Excel for further analysis. Entered, sorted and filtered data using Excel, and created dynamic analyzing model for ensuring effectiveness of job delivery

Accountant (Intern) | HONGXIN Accounting Firm, Toronto ON / May 2017 - July 2017

- Managed Account payable, Account receivable, and general ledger reconciliation for commercial clients
- Utilized a combination of QuickBooks and Excel to conduct business intelligence analysis on cost-saving opportunities
- Provided advisory and consulting sessions to clients on taxation and financial reporting related inquiries
- Executed strong attention to details in preparing monthly statements, expense accruals, and bank reconciliations
- Worked side by side with Master Accountant to create payroll statements for various major accounts

Data Analyst Assistant

Tim Hortons | Roll Up the Rim (RUTR) Campaign | Toronto ON | May 2019 – July 2019

- Worked on a consulting project for Tim Hortons, tasked to improve the profitability of customer loyalty program
- Utilized data driven strategy principal to analyze the campaign profit into determining KPI
- Prepared forecasting, P&L and budgeting reports, gained deep understanding of campaign process
- Deep dived into the relationship between key factors and profit. Recommended changes to the campaign design based on insights collected

EDUCATION

Master of Financial Accountability | York University | Toronto | ON

September 2018 - September 2019

- Specialized in Corporate governance and Risk Management

Bachelor of Commerce, Finance | York University | Toronto | ON

May 2014 - April 2018

Certificate Excel 2016 expert; CFA level II candidate; Udemy Advanced SQL

BUSINESS ACCOMPLISHMENTS

- Built financial model to reduce repetitive manual work
 - Used Excel spreadsheet to prorate the 10-month employee full-time equivalent hours from regular 12-month employee full-time hours
 - Calculated the work percentage to offer member eligible service to purchase and then run an actuarial buyback costing for member
- Led system modernization task-buyback redesign
 - Added service confirmation feature to add non-OMERS service to member's record in order to minimize follow-ups
 - Designed service confirmation form to allow member to follow the self-serve questions easily and make sure the questions are precise and clear to them by providing reference note
 - Reworded payment options to advise member to insert buy back their service with flexible payment options
 - Reviewed buyback election form and make sure it is in accordance with plan rules and legislative requirement
- Worked with pension databases and produced year-end annual pension statement for member
- Generated monthly report to capture the out of compliance issue and escalate to manager and senior leadership teams
- Worked on special clean-up project
 - Troubleshoot the variances on member's service records
 - Planned system workaround to get around the system errors
 - Tested the workaround system in bug fix environment
 - Processed the workaround and tested it once service record is posted
- Support the member services team in complicated cases and responded member's request to offer optimized options in terms of operational excellence and member's benefit
- Tested new changes or amendments in pension plan text and validated the system result and drafted the standard operation procedure
- Communicated with IT team to provide the core requirements from the proposed functionality or feature in the current platform
- Met with pension policy team to verify the operational procedures for specific employer groups