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Summary:

- **CPA and ARe (Associate in Reinsurance) with 15+ years strong financial reporting/analysis, problem solving experience in property and casualty insurance/financial service industry.**
- **2 + years hands-on experience in implementing dataset analysis based Python, SQLite and MongoDB across from different data source.**

Demonstrated Core Competencies

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|-----------------------------|------------------------|-----------------------|
| ➤ Data Analysis Automation | ➤ Pro-forma Financial | ➤ Financial Analysis |
| ➤ Python, SQLite, MongoDB | ➤ Statement Modeling | ➤ Financial Reporting |
| ➤ Data Visualization-Plotly | ➤ Reinsurance Modeling | |

Experience:

EPG Tech LLC

Senior Data Analysis Consultant

4/2017 to present

- Data Analysis – use Python to import/merge datasets from different sources, perform Excel function in Python to effectively verify the accuracy of dataset and apply Python codes to reshape the datasets for financial/data analysis.
- Data Scrapping – collecting data from Twitter API with Python and store in MongoDB for analysis
- Data Visualization – use Python to convert Excel file into SQLite database, then set index/join tables/query the dataset and plot/visualize the dataset.
- Dashboard – read data into Plotly and create interactive dashboard.
- Financial Modeling/Stress Test – develop key metrics/assumptions for financial modeling and change assumptions for stress test. Use Pandas Time Series to analyze financial data in different frequencies based on data distribution. Develop the code to reload/repeat the data analysis process in Python and export the result to Excel or CSV on daily, weekly, monthly, quarterly or yearly basis. For data testing, use data time series to generate dates (with/without business day, weekends) for data testing.
- Implement changes to system logics for report changes, data quality issues, and other required changes to existing logic for appropriate alignment for regulatory reporting.
- Reinsurance – evaluate and develop reinsurance reports with underwriting, IT, actuary departments and external party to determine reinsurance needs and comply with reinsurance reporting requirement.
- Business Evaluation – evaluate business plans for potential investment, and develop pro-forma financial models for business strategies and plans.
- Financial Analysis/Reporting - utilize data analytics tools to perform analytics on regulatory reports, develop and streamline financial reporting process to comply with regulatory/lender requirements

Physicians' Reciprocal Insurers - Roslyn, NY

Senior Consultant

2012 to 4/2017

Controller

2000 to 2010

Senior Financial Reporting Manager

1996 to 1998

- Created pro-forma financial model and stress model for reinsurance treaty evaluation and based on the result of the model to negotiate favorable reinsurance treaty term; the model also applied to treaty commutation and resulted in \$20 million in commutation saving for the company.
- Prepared NAIC UCAA application to obtain insurance company license and implemented whole accounting system for the newly created insurance company.
- Successfully researched and implemented NAIC SSAP Codification for the company.
- Reporting - Prepared GAAP/Statutory financial reports, regulatory filings as required by NY and PA Insurance Departments and reviewed 10K/10Q/flash reports for parent company.
- Reinsurance - Responsible for producing the assumed/ceded reinsurance quarterly reports, treaties analysis, inter-company reinsurance billing, collateral calculation and commutation analysis.
- Investment – Reviewed bonds, common stocks and other alternative investments to comply with the company's investment guidelines and ensure comply with SSAP standards.
- Research - Tracked FASB/GAAP/SSAP developments to implement in the financial reporting.

Excess Line Association of New York – New York, NY

Financial Director

2010 to 2012

- Reviewed US insurance companies' annual statements, actuary reports, RBC calculations, audit reports, MD&A, 10K/10Q, business plans and reinsurance programs.
- Prepared written analysis to present in the Board and Committee's meetings to determine the eligibility of insurers.
- Monitored European insurance companies' financial statements, NAIC International Insurance Department financial reports, investment portfolios, business plans and reinsurance programs and recommended the appropriate applicants to the Board.
- Reviewed Bermuda insurance companies IFRS/GAAP financial statements and audit reports.

Ambac Assurance Company - New York, NY

Financial Reporting Manager

1998 to 2000

- Responsible for consolidated annual statement of multiple insurance companies.

Education:

- St. John's University – MBA in Accounting
- Feng Chiang University, Taiwan - BA Major in Economics, Minor in Finance

Certifications and Computer Skills

- Certified Public Accountant
- Associate in Reinsurance (ARe)
- Microsoft Office, Python, SQLite and MongoDB