

James Qiu

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EDUCATION

University of Utah, David Eccles School of Business

Bachelor of Science, Finance – Emphasis in Advanced Financial Analysis

Minor in Chemistry (Completed)

Salt Lake City, UT

May 2020

Honors

- Dean's List

Related Coursework

- Python for Finance – Built linear regression model using Python that determined the linear relationships between various commodity prices, visualized financial trends
- Honors Valuation – Capital structure, assessed financial strengths/weakness, forecasting, real options, CAPM, and WACC
- Advanced Financial Modeling (Corporate Valuation) – Built iterative three-statement financial models with scenario analysis and valuation techniques such as DCF, precedent transactions, and comparable companies
- Advanced Excel – Financial modeling, worked with 100,000 entries from an external database
- Interpreting Financial Statements – Analyzed revenue recognition principles, inventory, goodwill, stock options/pensions, leases, and taxes through 10-K filings from the SEC to facilitate sound financial decision making

EXPERIENCE

Prestige Financial Services – Risk Management

Data Analyst

Salt Lake City, UT

August 2020 - Present

- Create Machine learning models for binary classification and regression business problems through its various stages of development: from data collection to deployment, and interpret results
- Constructed proprietary Python toolbox module containing classes and functions that enhances the model building process, making procedures such as feature engineering, EDA, and preprocessing, more efficient
- Customized a dynamic feature engineering class to improve model performance by 5 – 10% on RMSE and AUC metrics
- Utilize Git and Github for version control and proper documentation for all steps related to the model building process
- MSSQL for data collection involving different databases from different servers using complex joins to generate big datasets for team projects, self-projects, and third-party companies
- Visualize the effectiveness of third-party risk solution products via test dataset of over 700,000 entries, and make informed decisions about final product selection
- Visualize consumer behavior to determine patterns regarding poaching risk from other institutions

Risk Intern

September 2019 – August 2020

- Using big data sets to identify different variables for consolidation into uniform risk metrics in reports to senior management
- Visualized the effectiveness of proprietary HAWK alerts on its abilities to prematurely detect fraudulent consumer behavior
- Constructed Catboost machine learning models using techniques such exploratory data analysis, and feature engineering to enhance accuracy of income verification data
- Utilized MSSQL to work with proprietary database for data collection to identify and eliminate redundant procedure in cross-team project with Servicing department

University of Utah – Department of Finance

Teaching Assistant for Instructor Vlas Lezin – Financial Programming

Salt Lake City, UT

August 2019 – May 2020

- Conducted weekly study sessions with students to enhance their understanding of Python fundamentals
- Troubleshoot and grade Python programming assignments for 86 students to 100% accuracy

University of Utah – Student Investment Fund

Equity Research Analyst

Salt Lake City, UT

August 2019 – May 2020

- Selected as 1 of 21 student analysts to manage a \$800,000 investment fund that continues to outperform the S&P 500
- Produce buy/sell/hold recommendations for five securities in the fund after daily coverage and performance assessment, generated 175% returns to date
- Conduct regular presentations on market news and current events

University of Utah – Department of Finance

Teaching & Research Assistant for Professor Mark Jansen – Financial Management

Salt Lake City, UT

December 2018 – May 2020

- Reconciled research data with external data, match over 250,000 entries to 100% accuracy via Excel and Python for private equity research project
- Develop exam questions and case studies that effectively test over 150 students' understanding of TVM, capital budgeting, CAPM, WACC, and financial analysis