KARI (XINZHU) YU

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EDUCATION

UCLA ANDERSON SCHOOL OF MANAGEMENT — Los Angeles, CA
M.B.A., Full-Time Program, 750 GMAT, Merit Scholarship — June 2020

- *Anderson Strategy Group*: Set impact maximization strategy comprising KPI formulation, operations optimization, and allocation methodology development for a LA-based non-profit organization during a 10-week consulting engagement
- *Master Thesis*: Researched industry dynamic and competitive landscape; developed marketing strategy for Fist Bev Venture
- *Leadership/Membership:* President – Greater China Business Association, AnderTech, Women's Business Connection

UNIVERSITY OF WATERLOO — Waterloo, Canada
B. Math, Computational Math/Optimization, Co-op Program, Computational Math Scholarship — June 2014

- *Leadership*: VP of Operations – Chinese Students Association; Producer – CKW Regional Radio Station
- *Co-op Internships:* Bank of Montreal (Fixed Income Analytics); TD Bank (Business System Analyst, Salesforce CRM); Sybase (Product Management); TD Asset Management (Portfolio Trading)

EXPERIENCE

VOXELCLOUD (Series B healthcare technology start-up backed by Sequoia and Tencent) — Los Angeles, California
MBA Intern, Go-to-Market Strategy and Business Development — January – June 2020

- Define GTM strategy for SkinAI product, synthesizing competitive intelligence and customer segmentations to produce marketing collateral; lead partnership outreach to 14 telehealth providers based on analysis of workflow and technology

MCKINSEY & COMPANY — Toronto, Canada
Summer Associate — June – August 2019

- Developed communications around business value of McKinsey's digital consulting product; worked with firm partners to define client architypes, develop sales playbook with client case studies, and organize demo events for 11 client service teams
- Facilitated adoption of process improvements for a global basic material producer during a cost-cutting transformation; communicated with client to discover business problems, brainstorm solutions, track initiatives and act on real-time insights
- Analyzed efficiency of client's operations, identified business issues and opportunities for headcount reduction with $8M per annum impact through benchmarking; firm leaders presented recommendations to client
- Established acceleration plan for client's cost-cutting project by constructing scenario analysis to forecast additional cost-saving and determine timeline range required to achieve cost saving of ~10% in FY' 20

TD ASSET MANAGEMENT (TDAM) (subsidiary of TD Bank, the largest bank in Canada by assets) — Toronto/Montreal, Canada
Associate Portfolio Manager, Quantitative Equity Strategies — September 2017 – May 2018
Associate, Passive Equity Strategies — May 2015 – August 2017

Product Strategy and Insights

- Collaborated with product and sales teams to identify opportunities for new investment products; identified product competitiveness including pricing and key features, and resolved operational challenges
- Led implementation of portfolio optimization software for new investment products by collaborating with engineers and managing project using JIRA to reduce operational complexity, saving software costs of up to $100K per year
- Automated end-to-end operations (data loading, trade generation) in cash reporting tool; consolidated function of 20+ Excel-based reports into one, reducing error rate by 30% by addressing algorithm inefficiencies using a data-driven approach

Quantitative Analysis

- Designed customized financial instrument for Deutsche Bank's 25 flagship ETF's (AUM of over $25B); analyzed over 60,000 transactions each month to identify capital losses, saving up to 20% capital gain tax for investors
- Analyzed trading commission structure using statistical models; recommended a new calculation methodology and negotiated commission agreements with cross-functional teams, saving over $200K each year in commission cost

CIBC WHOLESALE BANKING TECHNOLOGY — Toronto, Canada
Rotational Analyst – developer, business analyst — August 2014 – May 2015

- Developed user interface, drove product testing, and gathered requirement for a trading platform used for counterparty valuation adjustments, reducing hedging cost up to 50%; analyzed downstream impacts of a system migration project

ADDITIONAL

- *Software:* VBA (Advanced); SQL, R, MATLAB (Intermediate); Python, PowerShell, C, C++, C# (Beginner)
- *Interests:* Organize potlucks, work on side projects (McGill Startup Competition Semi-Finalist – Project Chefmate)
- *Certifications:* CFA