

Marcus Pan

Finance & Economics Student | Analytical Problem Solver | Strategy & Data Enthusiast | Former Military Serviceman
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Education and Certifications

University of Toronto – Rotman Commerce 2022 - Present (expected 2028)

(Bachelor of Commerce, Specialist in Finance and Economics)

- Took a **2-year leave of absence (2023–2025)** to complete mandatory military service in Singapore.
- **Relevant Courses:** Data Analysis and Applied Econometrics, Financial Accounting, and Capital Market Theory

Canadian Securities Institute – Canadian Securities Course

Jun 2023 - Apr 2024

- Gained exposure to capital markets, investment risk management, and FINTRAC AML compliance standards while building foundational knowledge of securities, equity/debt valuation, and Canadian regulatory frameworks.

Durham College – Life Insurance Qualification Program

Aug 2025 - Present

- Completing coursework on insurance planning, product comparison, and risk management fundamentals.

ACCA – Business and Technology, Financial Accounting

Feb - Jun 2024

- Completed modules covering financial reporting, internal controls, business structures, and the role of finance in organizational decision-making.

Work Experience

AIA Singapore (Marketing Intern)

May 2025 - Jul 2025

- Completed a 6-week professional development program focused on communication, consumer behavior, and client relationship management while gaining foundational exposure to financial advisory practices.
- Partnered with mentors and an 8-member team to design a clear, data-driven presentation simplifying complex financial products, increasing simulated client understanding by **~25%**.
- Analyzed and optimized delivery routes for 10 elderly households as part of an ESG volunteering initiative, sequencing visits to deliver food efficiently while minimizing travel time and backtracking, completing tasks within 2 hours.
- Came in **1st place** with my team in the AIA Intern Vitality Challenge, a fitness competition across the intern cohort, demonstrating teamwork, discipline, and commitment to wellness.
- Awarded **AIA 2025 Best Intern** after scoring **90+ out of 100** on performance criteria including professionalism, communication, initiative, and leadership.

Singapore Armed Forces (Corporal)

May 2023 - May 2025

- Built a data-driven tracking system consolidating 6 readiness metrics for **30+ personnel**, enhancing leadership decision-making speed and report accuracy by **~20%**.
- Streamlined data workflows by integrating 2 daily reports on equipment and incident logs into a unified reporting system, reducing redundant communication and increasing data accuracy across 12-hour shifts.
- Trained new personnel on data entry standards and reporting procedures, improving consistency and reducing errors.

McDonald's (Customer Relations Associate)

Aug 2022 - May 2023

- Cross-trained across **5 operational stations** (McCafé, fries, packaging, front counter, and drive-thru) to maintain smooth service flow during peak hours.
- Served customers as a cashier and drive-thru operator, managing high volumes of orders with speed and accuracy; handled payments, resolved issues on the spot, and coordinated with kitchen staff to ensure timely, error-free service.
- Balanced full-time coursework with **6-hour** morning shifts before classes, demonstrating exceptional time management, reliability, and work ethic in a high-pressure environment.

Extracurriculars and Projects

University of Toronto Economics Club (Outreach Committee)

Sep 2025 - Present

- Increased event engagement by **20%** through targeted outreach to professors and speakers, strengthening faculty-student relations and club visibility.
- Advised a teammate on improving outreach email strategy by refining structure, clarity, and value messaging, resulting in more polished and effective communication with speakers and faculty.

M&A Case Competition (Amazon × Ocado)

Oct 2025

- Conducted valuation and synergy analysis for Amazon's potential acquisition of Ocado within 2 days; developed **3 alternative strategies** and recommended a 'Do Not Acquire' decision supported by financial and ESG analysis.
- Delivered a **10-minute** solo presentation after teammates were unable to attend, demonstrating initiative, composure, and strong communication under pressure.

Additional

Languages: Fluent in English and Mandarin, Basic Proficiency in Cantonese

Analytical & Technical Skills: Excel (Pivot Tables & Analysis), Data Visualization, Python, Research & Presentation Design

Interests: Sports and Fitness, Classically Trained Pianist (ARCT Diploma), Networking and Community Engagement, Capital Market Trading, Case Competitions