

YILIN (LILY) LI

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PROFESSIONAL EXPERIENCE

China Citic Securities

Guangzhou, CN

Finance Intern

Jun 2024 - Aug 2024

- Recorded daily opening and closing prices for over 50 securities, ensuring 100% accuracy in data entry for use in weekly and monthly performance analysis reports.
- Interacted with over 30 clients weekly to understand their investment goals and needs. Provided detailed explanations of more than 15 existing and newly launched funds and equities, leading to a 20% increase in client satisfaction scores based on feedback surveys.
- Acquired in-depth knowledge of over 25 financial products, including 10 newly launched funds. Effectively communicate product benefits to clients, resulting in a 15% increase in product inquiries and a 10% rise in client engagement with new offerings.
- Conducted preliminary research on market trends and the performance of over 20 securities each week, providing insights that informed investment recommendations and contributed to a 12% improvement in portfolio performance for key clients.
- Analyzed and reported daily and weekly financial news, predicting the impact of government policies and international events on market conditions. Helped clients adjust their investment strategies, leading to a 10% increase in portfolio returns over the summer.

China Citic Bank

Guangzhou, CN

Finance Intern

Jun 2023 - Aug 2023

- Conducted Client Investment Risk Assessments: Utilized advanced financial models to assess client investment risks tolerance, successfully evaluating over 50 client investment cases. Including reviewing financial statements, investment portfolios, and market trends, to ensure clients' accurately target their financial goals.
- Assisted Clients with Account and Card Openings: Guided more than 100 clients a day through the process of opening new accounts and cards, including collecting necessary documents, completing application forms, and ensuring a smooth onboarding experience with 100% opening rate and over 95% satisfaction.
- Provided Reception and Information Services: Served as the first point of contact for clients visiting the bank for an average of 20 clients per day, offering direct consultations, resolving issues, and providing information about the bank's services, demonstrating exceptional customer service skills.
- Collaborated Effectively within a Dynamic Team Environment: Worked with team members from different departments, participated in regular meetings, contributed ideas for improving operational efficiency, and supported the implementation of new processes and services, improving my ability to work in a changing environment and develop strategies for overcoming challenges.

EDUCATION

University of Illinois Urbana Champaign (GPA: 3.87/4.0)

Champaign, IL

B.Sc. in Finance

Sep 2022 - Present

- Courses: Accounting and Accountancy, Business Dynamics, Business Analysis & Data Management, Marketing, Economics, Quantitative Economics, Statistics, Linear Algebra, Python, Corporate Finance, Calculus

PROJECTS

John Deere Company SWOT Analysis

Champaign, IL

John Deere Representative

Aug 2023 - Dec 2023

- Completed an in-depth SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis of John Deere Company, covering over 5 key factors to assess market positioning and strategic initiatives.
- Identified major strengths such as the innovative product lines and robust global distribution network, contributing directly to the company's leading position in the global market.
- Highlighted challenges like intense market competition and regulatory pressures, proposing targeted improvements to enhance competitive market positioning.
- Featured John Deere's outstanding mental health support program, reaching over 1,000 farmers and customers, significantly improving their quality of life and work efficiency.
- Presented findings and strategic recommendations to John Deere representatives, demonstrating effective communication and analytical skills, which sparked discussions on strategic adjustments.

SKILLS

Microsoft Word, Excel, PowerPoint, Python, Tableau, Canva, Desmos