

**Education**

<b>University of Michigan – Ann Arbor, MI</b> <ul style="list-style-type: none"><li>• <b>M.S. in Quantitative Finance &amp; Risk Management</b></li></ul>	Sept. 2023--May. 2025 (Expected)
<b>Case Western Reserve University – Cleveland, OH</b> <ul style="list-style-type: none"><li>• <b>B.S. in Applied Mathematics, Minor in Economics and Psychology</b></li><li>• Dean's Honor for two semesters</li></ul>	Aug. 2019--May. 2023

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**Skills/Coursework/Other Information**

- **Mathematics:** Linear Algebra, Financial Mathematics, Discrete State Stochastic Processes, Fundamentals of Analysis, Discrete Mathematics, Probability, Arbitrage Theory, Derivative Pricing, Black Scholes Model, Markov Chain
  - **Statistics:** Basic Statistics, Time Series, Regression Models, Multivariate Statistical Models
  - **Data Analysis:** Data Visualization, API
  - **Economics and Finances:** Macroeconomics, Microeconomics, Sports Economics, Basic accounting
  - **Programming/Computer Skills:** Python (Numpy, Pandas, Matplotlib, QuantLib), R, SQL, Microsoft Office, ChatGPT
  - **License:** CFA Level I Exam (Expected in February 2025)
  - **Languages:** English, Mandarin, Cantonese
  - **Leadership:** Club President for Chinese Students and Scholars Association( 2020-2021), raised over \$15k+ funding
  - **Volunteering:** Two months of teaching English and supporting orphanages in China and Thailand.
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**Internship Experiences**

<b>Tianhong Asset Management Co., Ltd.</b> <i>(Top 5 fund companies in China)</i>	Shenzhen, China
<b>Institutional Sales Department</b> (Python \ Microsoft Office \ Data Organization \ Data Visualization)	May. 2024--Aug. 2024
<ul style="list-style-type: none"><li>• <b>Deep Involvement in Client Marketing Process:</b> Gained a comprehensive understanding of the public fund institutional sales process, including marketing, roadshows, credit access, subscriptions, redemptions, and post-investment activities. Independently managed credit approvals and product access for 15 banks, handled over 10 subscription and redemption requests, and managed post-investment activities for more than 20 institutional clients. Created standardized documents to improve efficiency and established a replicable workflow for the department.</li><li>• <b>Pure Bond Product Analysis With Open Data:</b> Utilized Python and machine learning to analyze data from multiple pure bond products. Developed regression models to determine daily bond duration and used these models to assess competitors' holdings, providing insights to optimize product allocation.</li><li>• <b>Analysis Market and Product Data:</b> Regularly collected data on newly declared and established public fund products. Monitored market trends, competitor product layouts, and fundraising activities. Compiled monthly fund market reports analyzing issuance shares, sizes, and trends, identifying potential opportunities, and visualizing data and conclusions by graphs and charts.</li><li>• <b>Coordinating Interbank Industry Events:</b> Assisted in hosting the "2024 Financial Company Industry Conference" in Tianjin. Managed event planning, budget allocation, supplier coordination, and interactions with fund managers and customers during the event.</li></ul>	
<b>GF Securities</b> <i>(Top 10 Securities Company in China)</i>	Guangzhou, China
<b>Wealth Management Department</b> (Event Planning)	June. 2023--Aug. 2023
<ul style="list-style-type: none"><li>• <b>Live Broadcast Planning:</b> Collaborated with fund managers to plan and conduct live broadcasts promoting popular ETFs in the market, followed up with over 70 customers, resulting in an approximate 3% increase in overall sales.</li><li>• <b>Event Operation:</b> Planned and executed sales incentive activities for outstanding fund managers, coordinating and serving over 50 fund managers.</li></ul>	
<b>Fogang Rural Commercial Bank</b> <i>(Top Boutique Commercial Bank in China)</i>	Qingyuan, China
<b>Sales Department</b> Finance and Tech Department Credit Department (SME Loans) (Microsoft Office)	June. 2022--Aug. 2022
<ul style="list-style-type: none"><li>• <b>UNEP FI Membership and Green Finance Initiatives:</b> Led the translation and preparation of the bank's ESG (Environmental, Social, and Governance) documentation, and supported the bank's chairman in responding to inquiries. Played a key role in facilitating the bank's membership in the United Nations Environment Programme Finance Initiative (UNEP FI), becoming the first bank in Guangdong Province to sign the Principles for Responsible Banking. Collaborated with an Environmental Assessment Company to investigate the bank's carbon emissions, the remaining volumes of green loan transactions, and potential green loan customers. Calculated the expected benefits from carbon emissions trading and contributed to the preparation of the "Environmental Information Disclosure Report" submitted to the local People's Bank of China and UNEP FI.</li><li>• <b>Credit Investigation and Post-Loan Management:</b> Conducted pre-loan investigations and post-loan management for over 10 small enterprises. Performed on-site visits to understand business operations, and collected financial data and bank statements. Analyzed financial indicators over time, compared data with industry peers to assess financial health, profitability, and risk. Provided essential insights for loan approval and evaluating repayment capabilities.</li><li>• <b>Debit Card Market Promotion:</b> Identified low debit card penetration among local youth and addressed it by organizing offline "Honor of Kings" esports competitions. Required participants to hold a bank debit card as a condition for entry. Achieved a 5% increase in debit card openings among the youth demographic compared to the previous quarter, enhancing the bank's influence.</li></ul>	
<b>Guangzhou Automobile Group Co., Financial Company</b> <i>(Top 200 in 2023 Fortune Global)</i>	Guangzhou, China
<b>Planning and Investment Department</b> (Excel)	May. 2021--July. 2021
<ul style="list-style-type: none"><li>• <b>Updating Financial Report:</b> Analyzed the revenue situation of the department, created formulas using Excel prepared a version of the financial monthly report that was previously fully manual to one that is semi-automatically updatable.</li><li>• <b>Cross-Company Collaboration:</b> Participated in the company's cooperative activities with Industrial Bank regarding the purchase of fixed-income financial products and fund custody services, assisting in preparing investment reports and collecting related materials.</li></ul>	
<b>CITIC Securities</b> <i>(#1 Securities Company in China in 2023)</i>	Guangzhou, China
<b>Sales and Investment Department</b> (Python \ API \ Data Visualization)	May. 2020--July. 2020
<ul style="list-style-type: none"><li>• <b>Research on Fund Manager Investment Performance:</b> Researched financial products, investment philosophies, product performance, and portfolio holdings of over 10 fund managers, providing comprehensive analysis reports to support departmental decision-making.</li><li>• <b>Portfolio Allocation Using Python and API:</b> Designed and implemented a Python program to improve the accuracy of product recommendations and save time for investors. Used APIs to collect data on stocks, funds, and bonds, and developed a user interface for clients to select products based on quantity, investment amount, risk tolerance, and return requirements, visualizing recommending product portfolios by graphs.</li></ul>	