

# MATTHEW YEE

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*Financial professional with expertise in various life insurance and investment products looking to change career paths into the world of big data. Eager to apply and continue to learn skills in implementing, testing and debugging code for data software, technology and visualization.*

## CORE COMPETENCIES

Strategic and Data Driven Thinking, Analytics, Communication and Project Management, Creative Thinking and Initiative, Business Analysis and Development

## SKILLS, TOOLS AND INTERESTS

Microsoft Office Suite including Word, Excel, PowerPoint, Outlook SharePoint, and Access, Visual Basic Studio, Python, SQL, HTML, CSS, JavaScript, Adobe Frame Maker, Insurance Illustration Software, Social Media, Sports including football, basketball, baseball and hockey, Video Games, Dogs

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## EDUCATION

**University of California, Irvine** January 2018 – July 2018  
*UCI Data Bootcamp – Data Visualization*  
An intensive 24-week boot camp focusing on methods to mine, prepare, analyze, visualize and present data both numerically and graphically.

**University of California, Los Angeles** September 2009 – March 2013  
*Bachelor of Arts: Business-Economics* GPA: 3.3/4.0  
*Lambda Chi Alpha Fraternity: Founding Father, Internal Vice President, Ritualist, Intramural Sports Chair*

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## WORK EXPERIENCE

**Pacific Life Insurance Company** January 2016 – Present  
*Product Support Analyst* Aliso Viejo, CA

- Oversee product development by creating and updating product scope, product specification and ensuring feasibility from Information Technology, Compliance, Tax, Marketing, Competition and other Internal Division to make sure that needs are met and specification are executed as intended.
- Develop tools, scripts and reports to analyze, visualize and summarize internal data including sales data, lapse data, product and feature profitability data
- Benchmark and analyze products to ensure that products yield intended results across multiple company platforms including internal administrative systems, producer illustration systems and customer service interface systems.
- Develop and review product and rider specifications, internal product rates, and other numerical summaries or tools for internal and/or external departments.
- Review internal and external documents as subject matter expert to ensure that communications within the company and outside the company accurately represent the products and features of Pacific Life's products.

**Forester's Financial** October 2013 – December 2015  
*Financial Services Representative* Monrovia, CA

- Developed prospecting plans including contacting natural market, utilizing warm and cold calling, hosting seminars and interacting using social media.
- Carefully reviewed clients' risk profiles, current assets and liabilities, time horizons, and investment, supplemental income and insurance needs to determine long financial plans designed to optimize short-term and long-term incomes.

**First Property Corporation** April 2013 – September 2013  
*Real Estate Intern* Beverly Hills, CA