

MICHAEL LU

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ABOUT ME

Professional Qualifications

Languages

Software

Interests

Chartered Financial Analyst: Level 3 Candidate

Mandarin (native), French (basic, currently self-studying)

Microsoft Suite, R, Python, Salesforce, Slack, WebEx, Zoom

Rock climbing, weiqi, data visualization, poker, running, virtual reality

PROFESSIONAL EXPERIENCES

RBC Global Asset Management (Toronto, ON), *Business Development Manager*

Sept 2017 – Present

- FY2018: 2nd place in net new clients. FY2019: 2nd place in national gross/net sales. FY2020: 3rd place in national gross sales.
 - Makes >40 outbound calls/emails per week, builds and maintains strong relationships with >200 clients.
 - Grew a new fund's AUM by 67% within 2 months after a 6-month pre-sale relationship building with target clients.
 - Delivered 13 investment outlook presentations (Sept 2020) which helped clients close ~\$40M of new businesses.
 - The only approved Mandarin speaker/presenter in the RBC GAM ACS Channel.
 - Quickly adopts new capabilities like the portfolio review tool, conducted 4 reviews and won \$4M worth of businesses.
 - Crafts and implements sales strategies with wholesalers and BD associates.
- Organizes weekly sales calls, mentors and develops junior team members.
 - One of the junior team members has now been promoted to an inside wholesaler.
 - Currently managing the business development associate on the team in an informal basis.
- Actively participates in thought-leadership sessions on new sales strategies/tech.

Canadian Imperial Bank of Commerce, Capital Markets (Toronto, ON), *Analyst (6M contract)*

Oct 2016 – Mar 2017

- Managed the Foreign Exchange (FX) Conversion and Banknotes businesses for institutional/retail clients worth ~\$70M.
- Successfully led a 7-member team to streamline a supply chain process by 25% with a business vendor in 2 weeks.
- Managed >6 existing accounts on a bi-weekly basis via conference calls, regularly prospected clients in Europe/LatAm.
- Collaborated with the sales team to create customized pitchbooks which resulted in 10% increase in incremental revenue.
- Built Access (SQL) and VBA tool which collectively streamlined business decision-making process by ~85%.

Canadian Imperial Bank of Commerce, CAM (Toronto, ON), *Senior Analytics Consultant*

Sep 2015 – Sep 2016

- Spear-headed the team's text-analytics research, produced 4 treatment metrics using R's KNN package.
- Advised on the strategic direction and analytics best practices through >20 exchanges with senior management.
- Saved \$1.6M by identifying and managing alternate channel risks via decision-tree modeling (R, SAS, SQL).
- Full-stack project ownership of 5+ pilot projects which booked an annual benefit of \$15M+.

Willis Towers Watson (Toronto, ON), *Actuarial Consulting Analyst*

Aug 2013 – Sep 2015

- Led an international operations team of 6 to develop a \$1.2M pension de-risking strategy.
- Trained 3 on-boarding entry analysts on pension plan design, pension calculations, and client-oriented communication.
- Managed relationships with 10+ international clients, worked with the senior consultants to deliver LDI strategies.

EDUCATION

University of Waterloo (Merit Entrance Scholarship - 2008)

Waterloo, ON (2013)

Honours Bachelor of Mathematics Co-op, Actuarial Science & Finance

LEADERSHIP & ENTREPRENEURIAL PROJECTS

Director, Board of Directors at Concord Cityplace (TSCC1955)

Jan 2019 – Present

- Voted in by 300+ tenants, tasked to improve and maintain the condominium's 1st quartile standing in various metrics.
- Actively engages the local community, identifies and resolves tenant affairs, reviews budget and spending initiatives.

Professional Development, Canadian Chinese Finance Association (CCFA)

Feb 2020 – Present

- Plans, executes, and moderates investment-themed events for young professionals.
- Organized and co-hosted 3 professional events in a virtual format, attended by 300+ professionals.