

# NIKLAUS CHANG LIU

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## EDUCATION

**Wilfrid Laurier University | Lazaridis School of Business and Economics**

**Waterloo, ON**

Major in Economics and Accounting

Graduate: Apr 2023

- **Relevant Coursework:** Accounting, Data Analytics, Economics, Econometrics, financial management, Financial Modelling

**Pursuing CFA:** CFA Level 1 in Progress, expecting exam in 2024

**Google Advanced Data Professional Certificate:** In Progress

## EXPERIENCE

**Dream Unlimited. Inc**

**Toronto, ON, CA**

Developing Accountant, Intern

May 2022 – Aug 2022

- Prepared monthly and quarterly financial Reporting Packages to support management strategies and decisions
- Collaborate with stakeholders from various teams to execute key transactions and financial operations for certain projects
- Assisted in ad-hoc projects included cashflow forecasting, intercompany transactions, and etc.
- Conducted data manipulation in Power Query from multiple data sources to automate recording journal entries
- Prepared and analyzed account reconciliations, ensuring the balances in the system align with the bank's records.
- Performed analyses in budgeting and forecasting to support management decisions

**Deloitte China**

**Remote**

Financial Accounting Advisory, Intern

May 2021 – Jun 2021

- Organized and processed large volumes of data from various clients' financial documents
- Recognized internal control and risk issues and, in conjunction with team leaders, optimize the readability of the dashboard report while adding drill-down capabilities to identify and investigate the anomalies significance level
- Evaluated past audit reports and composed a financial analysis report of a public company from both quantitative and qualitative perspectives to identify critical indicators of the company's potential risk factors
- Assisted with internal assurance for the PP&E account of the company through referencing JE and GL

## EXTRACURRICULAR

**NASDAQ Stock Market Analysis, an insight and analysis into the US Stock Market**

Jan 2023 – Apr 2023

- Developed Power BI dashboards to generate and present insights of NASDAQ stock market analysis
- Used Python to retrieve daily closing prices for over 2,000 stocks from Yahoo Finance for the past five years prepared data cleaning and organizing to improve data accuracy, relevance and representativeness
- Implemented DAX functions to generate measurements in Power BI to support additional analysis
- Summarized trends and presented insight analysis report from the sectors and industries perspective, identified winning industries and leading companies and discussed the potential factors affecting the markets

**Loblaw Companies Ltd. & Metro Inc. Business Investment Analysis Project**

Sept 2020 – Nov 2020

- Analyzed the annual reports of Loblaw Companies Ltd. and Metro Inc. and calculated multiple financial indicators of both companies such as P/E ratio, EPS, and return on asset
- Implemented valuation analysis (DCF & Comparable Company analysis) to determine corporate value
- Developed personalized investment proposal based on customer's demands, financial position, and risk tolerance by comparing various financial indicators

## SKILLS

- **Microsoft:** Excel (Advanced functions, Pivots), Power Query Editor, Power BI (DAX), PowerPoint, Word, Outlook
- **Financial Modeling & Analysis:**
  - Using historical data to prepare sales budgeting, production budgeting, forecasting
  - Using valuation analysis (DCF/comparable company analysis) to evaluate company's market value
- **Computer languages and tools:**
  - *Python & SQL* – Intermediate proficiency in data analysis using Python (NumPy, Pandas, etc.) and structuring queries with SQL
  - *Power BI* – Hands-on experience in developing data models and analytical dashboards