**PETER ZHAO**

CPA Student/Staff Accountant

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| **Skills Highlight** |

* Proficiency in Microsoft Excel developed through six years of hands-on experience, including areas such as:
  + Writing complex formulas, handling pivot tables, and understanding best practices;
  + Utilizing VBA Macros for automation of manual tasks, data manipulation, and processing large datasets.
* Outstanding problem solving skills exemplified in process improvements implemented at RSA Canada, such as run-off reporting, Solvency II income statement, and facultative claims invoicing.
* Solid background in IT related financial accounting and controls acquired through experience at RSA Canada, University of Waterloo, and IT/Finance related experience at CGI Group Inc.
* Strong comprehension in the complex area of intangible assets obtained while working as Accounting/Audit Staff at Cameron Keller & Company and through study of IFRS standards in preparation for the CFE.

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| **Professional Experience** |

**CPA Student/Staff Accountant**

RSA Canada, Toronto, ON (Sep 2015 – Present)

* Spearheaded or assisted with numerous process improvements, applying advanced Excel and financial reporting knowledge to automate or expedite monthly/quarterly tasks. Implemented three process improvements that each resulted in time savings of 2-3 work days per quarter.
* Responsibilities included preparing journal entries, providing technical accounting support, developing processes to ensure sound financial accounting practices, and producing key monthly and quarterly deliverables.
* Commended for ability to challenge the status quo and find solutions to problems. Was often given outdated processes or difficult problems to fix or solve, and consistently produced exceptional results.

**Accounting/Audit Staff**

Cameron Keller & Company, Waterloo, ON (Jan 2014 – Aug 2014)

* Compiled financial statements and tax returns which complied with the relevant GAAP and the Income Tax Act. Mainly used the programs Caseware/Caseview and Intuit Profile. Focus was on notice-to-readers, review engagements, and filing T1’s for individuals and T2’s for corporations.
* Other responsibilities included aggregating investment summaries, assisting in documentation and fieldwork for auditing engagements, bookkeeping, and counting votes for shareholder resolutions.
* Developed competency in financial reporting, assurance, and taxation through exposure to a variety of corporations with different accounting and tax needs and learning how to apply academic concepts.
* Achieved an “Excellent” work-term evaluation by consistently preparing files that require little to no adjustments, in a timely manner. As a co-op, exceeded expectations by completing files usually reserved for full-time professionals.

**Technical Analyst – Financial Services**

CGI Group Inc., Toronto, ON (Jan 2013 – Apr 2013)

* Oversaw the implementation of the Internal Cloud Platform, a tool that reduces costs by providing centralized hardware, for the Architecture Business Unit.
* Provided financial and technical support in a consultant role, compiled and presented contract adjustments to clients, and performed other administrative tasks.
* Strong expertise in Management Accounting was required to keep track of commissioned machines and transfer pricing between Architecture Business Unit and the centralized unit in Montreal.
* Achieved an “Excellent” work-term evaluation, mainly due to the cost-savings resulting from the implementation of the Cloud Platform. A project management professional usually spearheads a task of this magnitude, therefore my ability to perform this task admirably allowed the Business Unit to reallocate resources to other profitable projects.

**Junior Web Developer**

Rich Media Inc., Toronto, ON (Jan 2012 – Apr 2012)

* Facilitated communication of business and technical requirements between Rich Media and various large financial institutions, developed web pages and mobile applications as part of a small team, and specialized in identifying and fixing production issues to ensure adherence to production schedules. A major project was the yearly update of several web pages requested by a large financial institution with 1000+ clients.
* Trained in a variety of valuable IT and communication skills, such as database maintenance, website development, IT consulting, project management, and troubleshooting.
* Achieved an “Excellent” work-term evaluation due to the ability to learn difficult concepts rapidly and contributing documentation and many pieces of code into the internal Code Library.

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| **Academics** |

**Master’s Degree in Accounting**

University of Waterloo,Waterloo, ON (Graduation: Aug 2015)

* A CPA accredited, career focused program that leads directly to the CPA Common Final Examination.
* Fulfills CPA core integration modules, two professional areas of study, and CPA capstone modules.
* Acquired depth in financial reporting and analysis, business valuation, international and domestic taxation, management accounting, auditing and assurance, and professional judgment.

**Passed CFA Level I Exam** (Jun 2014)

CFA Institute, Toronto, ON

* 42% of candidates passed the June 2014 Level I CFA Exam.
* Demonstrated ability to multi-task by studying for the exam part-time while fulfilling requirements in a full-time position as Accounting/Audit Staff at Cameron Keller CA.

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| **Activities and Interests** |

Treasurer, **RSA Canada Head Office Event Committee (NEEC)**

* Responsible for handling and balancing the NEEC events budget and investigation of discrepancies.
* Handled cash, cheque, and paypal deposits and processed invoices for NEEC expenses.

Competitor, **JDC Central Business Competition**

* Represented the University of Waterloo as part of the Management Information Systems team that placed 4th amongst 200+ other university attendees.
* Facilitated University of Waterloo’s entrance into JDCC as a first year competitor and provided experience, guidance, and blueprints to train teams that will participate in future competitions.

Orientation Leader, **Accounting and Finance Orientation Week**

* Mentored a team of 50+ students through orientation activities such as ice-breaker games and team spirit cheers while demonstrating school spirit.
* Assisted new students with adapting to a new school environment by offering support whenever requested and taking students in tours of campus and residence areas.

Debater, **University of Waterloo Debate Team**

* Competed at the McGill provincial debate tournament and other tournaments representing the University of Waterloo demonstrating school spirit, leadership, and initiative.
* Attended weekly practices where intra-school debate competitions were held to practice critical thinking, oral communication while working in a time-restrained setting.