

# Jim Phan

Boston, MA 02124 • jimphan.usf@gmail.com • (656) 204-6978 • linkedin.com/in/jim-phan

## EDUCATION

**Bachelor of Science in Finance – GPA: 4.0/4.0, SAT Superscore: 1460/1600 (Math: 800, EBRW: 660)** Tampa, FL  
Double Major in Bachelor of Science in Quantitative Economics and Econometrics Expected May 2027  
Relevant Coursework: Statistics I (A+), Intermediate Price Theory (A+), Principle of Financial Accounting (A)  
Awards: Green & Gold Scholarship, **First-Place** in Junior Enterprise KPMG Case Competition: Banking the Unbanked  
University of South Florida, Muma College of Business

## WORK EXPERIENCE

**Bain & Company** Boston, MA  
*Workday System Analyst Intern* July 2024 – December 2024

- Maintain Workday helpdesk, including updating the system, ensuring user security, and increasing system efficiency.
- Provide guidance and training for Bain & Company employees; identify needs to test and release new Workday functionality.
- Identify trends and highlight technical issues to provide recommendations to enhance Bain's system and process long-term.

**Sao Mai Long Son Kindergarten** Vung Tau City, Vietnam  
*Informatic Technology Specialist & STEM Teacher Assistant* June 2021 – Present

- Configured Google Suite & Microsoft Education system and contributed to engineering an audiobook library with Power Apps.
- Hosted Office, Canva, and Kahoot training sessions for teachers, following Microsoft Innovative Educator Master Trainer standards.
- Streamlined STEM events and in-class activities for 25 children during the summers of 2021 and 2022 using the 21CLD framework.

**University of South Florida** Tampa, FL  
*4v4 Flag Football Official* January 2024 – February 2024

- Officiated 20 men's, women's, and co-ed matches; demonstrated a solid ability to make quick judgments and ensure fair play.
- Committed 10 hours weekly during the season; received positive feedback from referees and supervisors on my performance.

## LEADERSHIP AND COMMUNITY INVOLVEMENT EXPERIENCE

**Investment Club at USF** Tampa, FL  
*Equity Research Associate* May 2024 - Present

- Work with 5 Global Investment Research team associates to provide monthly equity research reports in the Consumer/Retail sector.
- Participate in 150+ hours of intensive training in reading financial statements, building DCF, LBO, and applying M&A knowledge.

**HEXA Consulting Junior Enterprise** Tampa, FL  
*Vice President* April 2024 – Present

- Maintained partnerships with 10+ companies in the United States and matched suitable projects with HEXA's consultant groups.
- Analyzed funding distribution plan with the Finance Director and President to plan 10 events for USF's student community.
- Published management consulting guides on crucial interview topics: brain teasers, market scale, and behavioral preparation.

**Project Manager** October 2023 – May 2024

- Managed 7 consultants to craft financial statement templates, market expansion plans, and branding kits for 2 companies in Tampa.
- Utilized Excel to create financial statements and develop economic models for profitability analysis and cash flow planning.
- Developed dynamic dashboards using Tableau and Power BI to visualize financial reports and marketing strategies.

**The Gifted Battlefield Organization** Ho Chi Minh City, Vietnam  
*Head of Executive Committee & Finance Advisor* June 2021 – Present

- Advised on financing for 2 workshops. Attracted 354 9th-grade participants, receiving ticket revenue and sponsorship total of \$2,000.
- Spearheaded 400+ high school students to organize online classes & mock test communities for 800+ junior high school students.
- Optimized Power Automate workflows to reduce resume screening time by 50% (400 profiles processed in 1 instead of 2 weeks).
- Coordinated extensive training sessions in building automated workflows in Microsoft Education and Google for Education platforms.

**Little Stars Science Club** Ho Chi Minh City, Vietnam  
*Finance Analyst & Program Associate* June 2015 – August 2023

- Organized 100+ for-profit programs to expand experimental STEM education to 2,000+ children from 6 to 15 years old.
- Distributed \$10,000 to conduct non-profit STEM events for children in rural areas and buy study necessities for students.
- Collaborated with professional psychologists to build specialized non-profit STEM programs for 100 autistic science lovers.

## CERTIFICATIONS, SKILLS, AND INTERESTS

**Certifications:** Microsoft Office Specialist Master 2019 (Word Expert, Excel Expert), Microsoft Office Specialist Associate 2019 (Word, Excel, PowerPoint), Accounting Fundamentals, Power BI Fundamentals, Fundamental of Data Analysis in Excel, Power Query Fundamentals, Accounting Principles and Standards, Introduction to Business Valuation (CFI™), Microsoft Certified Educator.

**Technical Skills:** Microsoft Word, Excel, PowerPoint, Power BI, Power Apps, Power Automate, Tableau, Financial Modeling.

**Interests:** Wall Street Journal, Teaching, Trading, Flag Football, Podcasting, Web Design, Running, Poetry, Andrew Carnegie.