Steven T. Lin

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**EDUCATION**

**University of Southern California, Marshall School of Business**  Los Angeles, CA

B.S. in Business Administration, Concentration in Finance, Minor in Economics August 2008 – May 2012

**CONCENTRATION COURSEWORK, USC**

**Financial Analysis and Valuation-Junior year**

* Applied DCF model, enterprise value, price multiples, chemical industry research, to evaluate Berkshire Hathaway’s acquisition of Lubrizol Co; resulted in my valuation justifying acquisition

**Investments, Derivatives, Alternative Investments-Junior/Senior years**

* Mastered the principles of portfolio management, risk, performance measures, P&L, securities and derivatives valuation, investment and trading analysis of equities, fixed income, alternative investments, derivatives

**Intermediate Macro and Microeconomics-Junior/Senior years**

* Performed ANOVA using Maple and Excel on Apple Stock prices against S&P 500 returns, time-series analysis of vitamin cartel’s effects on vitamin prices, MATLAB modeling of bond price sensitivity

**WORK EXPERIENCE**

**Wang, Potomac & Company, CPAs** Los Angeles, California July 2012 – Present

**Accountant**

* Created from the general ledgers working trial balances on Excel spreadsheets, and made appropriate adjusting journal entries; increased efficiency of firm by using VBA macros, Vlookup
* Performed inventory control, maintained accounts payable and accounts receivable using MAS90
* Audited pension investment funds, institutional, corporate client accounts; assisted in quarter and year-end audit and tax process, ensured compliance with GAAP and Sarbanes-Oxley Act

**Alamode Fashion Jewelry** Los Angeles, California May 2009 – September 2009

**Assistant Sales Representative**

* Serviced existing accounts, obtained orders, established new accounts, reconciled receipts through MS Excel

**COMPETITION, USC**

**Stocktrak Trading Simulation Team Competition**

* Led my team of five peers and won first place with a return of 400% and Sharpe Ratio of 2.87 within one year
* Analyzed and executed investing and trading strategies; shorted U.S. Treasury yields and the Euro for global macro strategy, shorted pairs of leveraged ETFs for arbitrage, sold Apple call options for hedging
* Prepared portfolio, risk, peer group analysis reports, monitored profits and losses daily for rebalancing

**LEADERSHIP**

**Trojan Investing Society, at the USC Marshall School of Business**  2010-2012

* Led and participated in discussions about the stock market, trading strategies by using MarketWatch

**Treasurer for Korean Student Association (KSA), at USC** August 2011 – May 2012

* Oversaw financial transactions, bank account maintenance, annual budget, funding
* Collaborated with seven other staff members, grew association to one of USC’s biggest culture associations

**SKILLS, ACTIVITIES & INTERESTS**

**Languages**: Conversational Proficiency in Chinese Mandarin

**Technical Skills**: Proficient in MS Office, MAS90, MySQL, Capital IQ. Intermediate in Maple, Matlab, Python.

**Certificates**: CFA level 1 and CAIA level 1 candidate

**Interests:** Basketball, Piano, Tennis, Golf, Stocks, Poker; created SQL database for hand analysis

References: Dr. L. Mick Swartz , USC Professor email: [mick.swartz@marshall.usc.edu](mailto:mick.swartz@marshall.usc.edu)

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David Wang, CPA email: Wpccpas@aol.com

work: 213-626-7170

Perry Huang email: perry.huang@gs.com

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