Kevin Leung
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425-773-1347
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May 26, 2015

Umbaugh
2150 Association Drive, Suite 100
Okemos, MI 48864

RE: Consultant

To Whom It May Concern:

I am contacting you regarding the open Consulting position listed on LinkedIn. I recently left my job in Seattle to pursue a personal dream, solo international travel. During my time abroad I realized that work was not fulfilling and I wanted to not only have a positive work environment but also an impact on the community as well. I also have professional skills that would help me successfully transition to a new career with Umbaugh.

I have developed an outstanding analytical ability and have the drive to constantly improve. In my previous roles as Portfolio Administrator and Retirement Benefits Consultant I pursued continuing education and certification, which has helped me see the bigger picture in my previous roles. I have had the opportunity to talk with a variety of individuals in my previous roles, which has helped me develop strong communication skills and the ability to present technical or financial information in layman's terms.

I am available any time and can be reached by phone or email. Please contact me at 425-773-1347 or via email at leungkevinh@gmail.com. I look forward to hearing from you on this career opportunity with Deloitte.

Sincerely,

Kevin Leung
Enclosure

Experience

September 2012 to September 2014: Portfolio Administrator/Reporting Analyst at Pacific Portfolio Consulting, LLC

Passed Level 1 of the CFA

Used Junxure (CRM) to track and manage key client events and client-ready deliverables.
Used MS Office Suite proficiently with critical emphasis on Excel, PowerPoint and Word.
Worked with multiple departments on deliverables and met weekly do discuss deadlines.
Played an integral role mapping a performance-reporting database and tested or quality.
Maintained asset allocations for models and benchmarks and their historical changes.
Provide, update, and maintained a library of scripts on system software for future use.
Provided support and training to co-workers on performance reporting database.
Supported communication and development of investment committee meetings.
Coordinated invoices to be paid by client and/or TPA and prepared fee reviews.
Prepared ad hoc, quarterly, semi-annual, annual reports and other deliverables.

January 2014 to May 2014: Course Facilitator for CFA Society of Seattle

Course Facilitator for Level 1 CFA candidates at Seattle University.
Liaison between professors and students.

January 2009 to September 2012: Retirement Benefits Consultant at Benefit Administration Company

QKA – Qualified 401(k) Administrator
RFP Certificate – Retirement Plan Fundamentals

Preparing the first draft of IRS Form 5500, 5500 SF, 8955-SSA forms.
Prepare and import annual census data for Annual Non Discrimination Testing.
Work with Participants, clients and vendors on withdrawal, distribution and loan processes.
Provide customer service to over 100 retirement plans and their participants.
Work with clients and vendors on payroll contribution and processing.

September 2007 to March 2008: Internship at Merrill Lynch

Reported to Client Associate and two Vice Presidents in the Wealth Management Division.
Analyzed mutual funds using risk and return metrics.

Education

University of Washington
Bachelor of Business Administration, Finance Concentration
GPA: 3.57
Dean's List
Graduation: March 2008