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| Roger (Yicong) Qiu, APMA® | **rogerqiu7@gmail.com • (832) 349-0490 • St. Louis, MO**  **GitHub:** [**https://github.com/rogerqiu7**](https://github.com/rogerqiu7) |

Dedicated and passionate professional with hands-on experience in establishing visualizations and strategies using financial data analysis, budget and forecast reporting, projections, and presentations. Demonstrated ability in strong technical skills, cross-functional collaboration, and lean process improvement abilities. Instrumental in statistical analysis of SKU item data to drive business profitability with product management team. Seasoned in building credibility with executive management, key stakeholders, and teammates by leveraging fervent communication and strong interpersonal skills.

**Relevant Skills**

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| * Corporate FP&A Reporting * Agile Frameworks - Scrum * Lean Process Improvement | * OLAP Database Analytics * Strong Communication Skills * Python for Data Analysis | * Data Modeling & Visualizations * Statistical Variance Analysis * Basic Front-End Engineering |

**Education**

**University of San Diego, Master of Science in Data Science - Expected May 2024**

Cumulative GPA: N/A, Relevant coursework: Machine Learning, Predictive Modeling, Big Data Analytics

**Saint Louis University, Bachelor of Science - May 2019**

Major GPA: 3.75, Minor in Information Technology Management

**Certifications & Designations**

Certified Lean Six Sigma White Belt | AIGPE, 2022

MOS Excel Expert (MS Excel 2019) | Microsoft, 2021

Analyze Data with Python | Codecademy, 2021

Computer Science for Business Professionals Course | Harvard University, 2021

Accredited Portfolio Management Advisor (APMA®) | Kaplan College for Financial Planning, 2020

Series 7 and Series 66 | FINRA, 2019

**Technical Proficiency**

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| * Microsoft Power BI, DAX functions * MDX query language * Python (see projects below) | * Microsoft Excel, PowerPivot * Oracle JDE EnterpriseOne * JavaScript (see projects below) | * IBM TM1 Planning Analytics * Microsoft Teams * HTML, CSS, Node.js, Angular |

**Full-Stack Webpage Project -** [**https://rogerqiu7.github.io/Web-Portfolio/**](https://rogerqiu7.github.io/Web-Portfolio/)

* Used JavaScript, CSS and HTML to design and build interactive webpage
* Used Object Oriented Programming JavaScript to develop back-end
* Used C#

**Python Portfolio on GitHub -** [**https://github.com/rogerqiu7/Python-Projects**](https://github.com/rogerqiu7/Python-Projects)

* Handwriting recognition – Use of KMeans clustering machine learning to predict numbers by reading handwriting
* Differential Calculus Limits – Proof of limits theory by using functions to visualize convergence of derivatives
* Rent Prediction – Use of Multiple Linear Regression model to predict Manhattan rent prices given inputs
* Blockchain Implementation – Use of Object-Oriented Programming to construct a blockchain with proof-of-work
* Stock Comparison – Use of pandas, numpy and matplotlib to build a basic stock analysis and visualization

**Professional Experience**

[**WernerCo**](https://www.wernerco.com/us)**, Itasca, IL September 2021 – Present**

**Financial Analyst**

* Modeled, interpreted, and presented financial data from company balance sheets and income statements in Oracle JDE and IBM planning analytics using Excel and Power BI to assist internal departments and to present to external investors
* Created and managed dynamic data reconciliation checks with live connections to multiple data sources using MDX query language, advanced Excel PAX formulas and Power BI dashboards to help retrieve, manipulate, and visualize three-dimensional OLAP cubes in IBM Planning Analytics
* Conducted statistical analysis on SKU portfolio health reports; Created and tracked key KPI metrics to ensure portfolio optimization were on track with product management direction and to eliminate less-profitable SKU’s

[**Merrill Lynch**](https://fa.ml.com/missourimissouri/chesterfield/power/)**, Chesterfield, MO August 2019 – September 2021**

**Financial Advisor**

* Joined *The Power Wealth Management Team* and successfully managed over $600 million of investments and assets by leveraging in-depth quantitative financial insights and performance analysis
* Performed comprehensive investment analysis using FactSet, Excel, Morningstar, and other applications, establishing portfolios with above-average returns in contrast with benchmarks and other portfolios

[**TD Ameritrade**](https://www.tdameritrade.com/)**, St. Louis, MO January 2019 – August 2019**

**Financial Services Intern**

* Conducted data-driven research and advised on market conditions, emerging trends, and investments procedures. Addressed significant client’s challenges, while facilitating key clients to achieve set goals.

[**St. Luke’s Hospital**](https://www.stlukes-stl.com/)**, St. Louis, MO April 2018 – January 2019**

**EMR Data Intern**

* Scrutinized, streamlined, and maintained large volume of data of patients on electronic medical record (EMR) and honed skills in eClinicalWorks and Cerner PC Ambulatory health information software

**Endorsements**

“Personally, I find Roger to be a team player who is always willing to go the extra mile in support of others. He has a fresh attitude and a willingness to make a difference within the organization. He has also shown an interest in learning how he can improve upon his skills.”

* **Paul Gem, Director of Global Finance Systems, and current colleague at WernerCo**

“Through his work, Roger has helped drive impactful strategic business discussions with senior executives and functional business owners at WernerCo. These discussions have helped set the strategic direction for Werner’s upcoming fiscal year as well as organizational compensation targets. During our discussions, Werner’s CEO was so impressed by the reporting dashboards that Roger developed that he requested the entire global organization to use these dashboards going forward.”

* **Mike Carlston, VP of Finance at Herff Jones, and former manager at WernerCo**

“Roger Qiu was a member of our Team at Merrill Lynch for 2 years from 2019 to 2021. In that time period, Roger displayed a strong work ethic, dedication, and leadership skills. He was responsible for portfolio investment selection, rebalancing and asset allocation modelling. Roger was very adaptable as he started his career at the beginning of Covid and not one time did he show any frustration with changes of policy and procedure.”

* **Barry Power, Senior Vice President at Merrill Lynch, and former manager**

“During out time at SLU together, Roger showed great passion and enthusiasm for his work and academics. He took his career goals very seriously, would lay out a 5-year plan and was always willing to help his friends with classwork and resume building. One of his best and most noticeable characteristics is his unmatched passion for whatever he does, especially in topics with which he is not yet familiar, which enables him to thrive in any area he finds himself in”

* **Royce Dong, MD-PhD student at University of Pennsylvania, and former Saint Louis University colleague**