

SHIRLEY YUAN

www.shirleyyuan.me
Shirl.yuan@gmail.com
519.635.6892

University of Waterloo
Math/ Financial Analysis & Risk Management,
Minor: Computer Science

SKILLS SUMMARY

- Excellent analytical and project management abilities enhanced through being the head financial analyst for DBRS's published Pension and Commercial Paper studies
- Proficiency with MS CRM, Salesforce, Office, SQL, MATLAB, R, Python, and Calypso Technology
- Bloomberg University certified; recognized for successful completion of Equity Essentials, Fixed Income, Commodities and FX exams
- Outstanding work contribution recognized through TD Securities Act for Impact Award for the Calypso Derivatives project upgrade
- Exceptional problem solving skills illustrated through earning first placement in Western University's Physics Bridge Building Contest

STUDIES

**Candidate for Math/Financial Analysis & Risk Management,
Minor in Computer Science,**
University of Waterloo

Sept 2011 -Present

AWARDS

- First Place in University of Western Ontario Physics Bridge Building Contest *2010*
- University of Waterloo's President Scholarship *2011*
- TD Securities Act for Impact Award for outstanding employee contribution *2014*

EXPERIENCE

Business Development Manager, Microsoft, Toronto ON

Sept 2014 -Present

- Initiated closed-loop process with Dynamics sales team and tracked opportunities in CRM
- Analyzed trends from different marketing activities and evaluated the success of tactics
- Generated pipe reports and used Microsoft Enterprise Planning systems to ensure activities and quarterly budgets are met
- Planned and executed events including MS Store Events with partners, CRM Online Lunch and Learn, Partner Readiness Tours

Business Analyst, TD Securities -Technology Solutions, Toronto ON

Dec 2013 -May 2014

- Successfully completed Calypso Derivatives upgrade through System Integration Testing (SIT) and User Acceptance Testing (UAT); familiar with Systems Development Life Cycle
- Coordinated with developers and end users, and performed manual regression testing to ensure core functionalities in Calypso version 13 are consistent with version 11
- Supported different application groups in the upgrade by reconciling reports, creating JIRA's, testing bug fixes, configuring Main Entry GUI and assigning user access permissions

Teacher's Assistant, University of Waterloo, Waterloo ON

Sept -Dec 2013

- Assessed math assignments for accounting students in a timely manner and provided constructive feedback
- Collaborated with head TA to ensure assignments are graded to meet deadlines and professor's requests

EXECUTIVE
LEADERSHIP**Financial Analyst**, DBRS, Toronto ON*Jan -May 2013*

- Headed DBRS's commercial paper and pension study; coordinated with Data and Publishing departments to effectively meet project deadlines and release study
- Consolidated European CMBS covenants for historical default probability analysis and trends in the European market
- Created financial profile key tables by spreading operating statistics and financial statements into Excel efficiently and accurately

Business Development Associate, DBRS, Toronto ON*May -Sept 2012*

- Constructed intermediary newsletter directed to U.S. and European banks; interviewed analysts in different sectors for DBRS's industry studies, rating reports, methodologies
- Co-organized DBRS's first corporate investor social in May 2012 at TIFF Bell Lightbox
- Researched and produced presentations for senior VPs on High Yield and SME bonds, iboxx and Merrill Lynch indices; used Bloomberg, CapitalIQ and Thomson Reuters
- Performed Salesforce cleanup and updated Salesforce regularly; familiar with Customer Relationship Management (CRM) models and cloud computing

News Writer, The Scene Magazine, London ON*Aug 2009 -Jan 2010*

- Produced seasonal entertainment articles distributed throughout London
- Captured audience attention using effective writing techniques and successfully met all necessary deadlines
- Voiced matters concerning students including recommendations for Western University students living away from home

President, UW Lego Initiative, Waterloo ON*Sept -Dec 2013*

- Obtained funding for projects from different faculties and organizations by conducting cost analysis and pitching project ideas
- Organized weekly meetings and encouraged members to design and build models as a team, with a common objective of constructing the entire Waterloo campus from Lego

President, Central S.S's Cancer Campaign, London, ON*Sept 2008 -June 2010*

- Organized innovative events such as Carnival of hope, Wax-Off and Dances, and actively motivated students to participate in fundraising activities to reach target
- Raised over \$8000 per academic year for Make-A-Wish Foundation

INTERESTS

Member of Interact, Rotary Club, London ON

Sept 2010 to Feb 2011

- Passionate about integrating within the local community; led discussions on identifying essential needs in the district then brainstormed solutions to meet the shortcomings
- Coordinated numerous fundraising events such as Christmas clothing drive for families living in subsidized housing

Favorite Pastimes

- Enrich knowledge and imagination through reading; some favourites include novels by Jane Austin, *Freakonomics* by Dubner and Levitt
- Enhanced travel experience of couch surfers and fostered cultural exchange by welcoming travelers, acting as a Canadian ambassador, and surfing couches in Taiwan, Germany and Austria