

# SHIRLEY YUAN

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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