

SHIRLEY YUAN

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

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SKILLS

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

AWARDS

Candidate for Math/Financial Analysis & Risk Management, Minor in Computer Science

University of Waterloo

Sept 2011-April 2016

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

2014

2011

2010

EXPERIENCE

Program/Business Development Manager, Microsoft, Toronto ON

Sept 2014 –May 2015

- Performed regression analysis on historical Microsoft Dynamics data to identify trends in sales cycle for midyear review
- Identified startup opportunity & initiated end-to-end marketing engagement at Communtech to build customer relations
- Built data reports and analyzed results from different marketing campaigns to evaluate the success of tactics and KPI's
- Managed partner, sales and stakeholder relationships to develop, execute and constantly improve new marketing activities that will generate additional pipeline and ensure appropriate ROMI

Business Analyst, TD Securities –Technology Solutions, Toronto ON

Dec 2013 -May 2014

- Successfully completed Calypso Derivatives upgrade project (\$10M+) for TD Securities international trading platform
- Familiar with Systems Development Life Cycle through System Integration Testing (SIT) and User Acceptance Testing (UAT)
- Collaborated with developers & end users from London, New York and Singapore offices to perform manual regression testing and establish consistent core functionalities
- Cooperated with different application groups in the upgrade by reconciling reports, creating JIRA's, testing bug fixes, configuring Main Entry GUI and assigning user access permissions

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
- Researched and produced presentations for senior VPs on High Yield and SME bonds, iboxx and Merrill Lynch indices using Bloomberg, CapitalIQ and Thomson Reuters
- Performed Salesforce cleanup and updated Salesforce regularly; familiar with Customer Relationship Management (CRM) models and cloud computing

INTERESTS

- Orientation2015 math head leader, facilitated first year transition to University of Waterloo
- President of UW Lego Initiative, performed cost analysis to obtain funding to model Waterloo campus from Lego
- President of Central S.S's Cancer Campaign, raised over \$8000 per academic year for Make-A-Wish Foundation
- Hour of Code, taught local highschool students basic computer science to make a game
- Volunteer at Junior Achievement's Dollars with Sense to empower middle school students to make smart financial choices
- Couchsurfing, hosted travelers in China and surfed in Taiwan, Germany and Austria