

# William Fan

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## EDUCATION

### William and Mary

Williamsburg, VA

*B.S. in Computer Science and Economics*

*Expected Graduation May 2026*

- **Relevant Coursework:** Multivariable Calculus, Linear Algebra, Algorithms, Software Development, Foundations of Math, Intermediate Microeconomics, Intermediate Macroeconomics, Business Statistics, Principles of Accounting

## WORK EXPERIENCE

### Webster Bank

Stamford, CT

*Private Banking Summer Analyst*

*June 2024-August 2024*

- Assessed macroeconomic trends to inform strategic asset allocation, optimizing portfolios according to clients' long-term financial goals and risk profiles
- Conducted portfolio analysis for portfolio managers to determine deviation from models and the S&P 500
- Performed in-depth research on securities and tailored recommendations based on client-specific requirements for income generation and appetite for risk

### Dominguez Wealth Management Solutions

Williamsburg, VA

*Wealth Management Intern*

*June 2023-August 2023*

- Participated in client meetings to assess risk tolerance and determine portfolio allocation
- Aided in fixed income strategies by calculating Social Security projections in Excel
- Engaged with wholesalers and gathered insights on various ETF's and their composition, which helped to inform investment decisions and client recommendations

### Second Pillar Consulting

Glen Allen, VA

*Python Developer Intern*

*May 2023-August 2023*

- Wrote Python and Scala modules to implement technical indicators and metrics as described in published research to aid in the development of climate change forecasts for financial institutions to conduct stress testing
- Ensured code was optimized for processing 30+ TBs of climate data and implemented unit tests to ensure code is accurate
- Used Sphinx module to write documentation to enhance code readability and usability

## LEADERSHIP EXPERIENCE

### Sigma Chi Fraternity

Williamsburg, VA

*Magister*

*December 2023-Current*

- Implemented Sigma Chi's accredited hybrid new member education program
- Directed weekly meetings, planned activities for new members, and led discussions to encourage values-based decision making
- Mentored new members and provided guidance on balancing schoolwork and other responsibilities

## SKILLS, AWARDS & INTERESTS

**Awards:** Won Best Finance Hack Runner-Up at TribeHacks Hackathon, Achieved an SAT score of 1530 – 780 Math & 750 Reading and Writing – 99<sup>th</sup> percentile, Awarded Dean's List for the Spring of 2023 for maintaining a GPA of 3.60+

**Technical/Relevant skills:** Microsoft Office, Python, Java, C, C++, R, Javascript, Typescript, HTML, CSS, Node.js, Express.js, React.js, PostgreSQL

**Interests:** Cooking, Tennis, Basketball, Personal Investing

**Activities:** Club Tennis, Mason Investment Club, Finance Academy, Association of Computing Machinery, Sigma Chi