

# Resume of Bo (Julia) LI

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## Professional Experience

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### Due Diligence Associate

09/2014-Present

*TRACE International, Annapolis, MD*

- Bases on FCPA, completed due diligence analysis for more than 100 multi-national intermediaries and multitasked 20 files simultaneously.
- Cooperated with advisory team and coordinated with clients directly to meet requirement raised by them during the due diligence process.
- Conducted reputational screening using Westlaw, Lexis and RDC for intermediaries and compiled due diligence reports for clients.

### Analyst

01/2014-08/2014

*Blue Ocean Wealth Management, Washington D.C.*

- Researched and Analyzed of case studies, white papers, and keynote presentations both on financial planning and on technology-related topics.
- Studied and synthesized portfolio investment strategy for vital clients and prospects.
- Led 3 colleagues to build pivot tables and to analyze more than 1000 observations using Excel and compiled report for Financial Planning Association (FPA).

### Research Analyst

12/2013-06/2014

*FDL Financial Service, Washington D.C.*

- Analyzed stocks, funds, and REITs' trend and risk applying SAS and built investment portfolio based on clients' risk tolerance.
- Researched events like The Brazil Olympic Games, analyzed their influence on food and entertainment industries, and chose stocks based on companies' previous financials and key ratios using MorningStar.

### Teaching Assistant

01/2014-07/2014

*Johns Hopkins Carey Business School, Washington D.C.*

- Appointed by professors as teaching assistant of Advanced Financial Accounting and Hedge Fund.
- Researched various topics in financial statement analysis, back-testing, hedge fund investment strategies that may be included in class.
- Held TA session weekly and helped more than 120 students.

### Intern, Communications Department

01/2013-03/2013

*HSBC, Beijing, China*

- Presented research summary about economic and policy trend to the President of bank directly bi-weekly.
- Maintained relationship with media, attended national meetings, and draft press release afterwards.

### Intern, Corporate Banking Department

09/2012-11/2012

*Bank of East Asia, Hubei, China*

- Evaluated customer records to determine loan-granting potential and generated reports for senior management on the investment potential of each loan application.
- Conducted research and composed feasibility analysis report for clients who want to open new stores or invest in IT and automobile industries.
- Discovered financial and business conditions of potential customers in field trips with the cooperation of customers.

## Education

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**Johns Hopkins University**, Master of Science in Finance (**GPA: 3.63/4.00**)

08/2014

*Courses Completed:* Statistics, Financial Modeling, Advanced Corporate Finance, Financial Risk Management, Investment Analysis and Portfolio Management, Fixed Income, Derivatives, and Advanced Financial Accounting.

**Wuhan University**, Bachelor of Science in Finance (**GPA: 3.82/4.00, 3%, Honored**)

01/2013

*Courses Completed:* Econometrics, Financial Engineering, Macroeconomics, Financial Economics, Money and Banking, and Financial Derivatives

**Ohio State University**, Summer Institute in Finance

08/2012

## Skills

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**Software:** Proficiency in Excel, Access, SAS, SQL. Good at Westlaw, RDC, Lexis

**Languages:** Fluent in Mandarin and English

**Certificate:** CFA III Exam Passed, SAS Certified Advanced Programmer

## Activities

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- **TEDxWHU, Co-founder** Held 3 TEDx Conferences and attracted 3000 followers on campus.
- **CPFC, Vice President** Invited speakers to share their insights and experiences in NGOs and contacted philanthropic organizations to offer help.