

Zhe (Amy) Sun

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EDUCATION

Candidate for Bachelor of Computing and Financial Management (BCFM)

Expected Graduation May 2020

University of Waterloo

Waterloo, ON

- **Awards:** UW President's Scholarship (2015), Canadian Women in Computing Coding Challenge (2nd Place)
- **Relevant Coursework:** Equity Investments, Derivatives, Corporate, Business Law, Statistics, Algorithms

WORK EXPERIENCE

Data Science Analyst

September 2017 – April 2018

Birch Hill Equity Partners

Toronto, ON

- Conducted qualitative and quantitative analysis of company financials and industry outlook to assist in valuing potential acquisition targets that aligned with Birch Hill investment criteria
- Performed thorough market research on industries to inform investment team when considering potential acquisitions
- Analyzed portfolio company data to present management team with recommendations on increasing sales leads
- Built applications using Javascript and geo-mapping APIs to assist investment professionals in finding locational synergies when conducting due diligence on deals

Business Analyst

January 2017 – April 2017

OMERS Private Markets

Toronto, ON

- Conducted meetings with stakeholders to define business requirements and create process documents such as project charters, workflow diagrams, and product change requests for IT projects
- Managed the migration of all company data to SharePoint by coordinating with internal business teams
- Conducted daily project triage meetings with developers to present business requirements and prioritize action items
- Wrote tests scripts for new enterprise applications used by over 40 employees during user acceptance testing
- Handled various ad hoc requests occurring throughout a project management life cycle in the waterfall methodology

Web Application Developer

May 2016 – September 2016

Kenna Technology Solutions

Toronto, ON

- Wrote optimized SQL queries to extract data from company database as per business requirements and diagnosed queries to improve efficiency in web applications
- Analyzed customer data using Excel and built VBA macros to convert a variety of spreadsheet data to XML
- Developed cross browser and device compatible applications using HTML5, CSS, Javascript for front-end, and Microsoft SQL Server and IBM LotusNotes for back-end
- Drafted communications between the development and business teams to ensure client satisfaction in final products

PROJECTS & COMMUNITY INVOLVEMENT

Business Development Director

December 2017 – Present

Hack the 6ix Hackathon

- Directed a team of 3 sponsorship associates through weekly meetings, delegated tasks, and provided resources
- Strengthened relationships with previous corporate sponsors, and established partnerships with 5 new companies
- Secured 25K in funding by developing a comprehensive sponsorship package including different pledge tiers

Independent Investor

July 2017 – Present

- Solely managed a portfolio of \$2,000 in US and Canadian stocks, utilizing a growth investing approach to yield 83% annualized return
- Selected investment vehicles and businesses based on industry research along with fundamental valuation methods

Associate

September 2015 – September 2016

Hedge Finance Conference

Waterloo, ON

- Organized areas of upcoming conference including web maintenance, sponsor relations, and workshop preparation
- Communicated with other associates and directors to optimize best practices and strategies for financial education
- Collaborated with advisors and student leaders in identifying ways to maximize conference participant experience

SKILLS

Technical Skills: Excel/VBA, Microsoft Suite, Capital IQ, Bloomberg, R, SQL, C, C++

Interests: Technology and Innovation, Traveling, Films, Figure Skating, Literature