

Amy Sun

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EDUCATION

Candidate for Bachelor of Computing and Financial Management (BCFM)

University of Waterloo

Expected Graduation April 2020

Waterloo, ON

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

WORK EXPERIENCE

Birch Hill Equity Partners

Analyst, Data Science Group

September 2017 – April 2018

Toronto, ON

- Conducted analysis of company financial statements and reviewed market research reports to assist in valuing potential acquisition targets that aligned with Birch Hill investment criteria
- Built financial models using historical data and created pro-forma forecasts based on industry specific metrics
- Performed statistical analysis (interpolation, regression modeling) on portfolio company data to present management teams with strategic recommendations to make improvements to the business
- Developed internal BI tools in Python, R, and Google Cloud Platform which expedited investment team tasks

OMERS Private Markets

Business Analyst

January 2017 – April 2017

Toronto, ON

- Worked with project stakeholders to define business requirements and drafted process documents such as project charters, workflow diagrams, and product change requests
- Conducted daily meetings with developers and project managers to update project progress and prioritize action items
- Assisted logistical migration of all company data to a new platform which improved the workflow of business users
- Handled various ad hoc requests occurring throughout a project management life cycle in the Waterfall methodology

Kenna Technology Solutions

Web Application Developer

May 2016 – September 2016

Mississauga, ON

- Wrote optimized SQL queries to extract data from company databases as per business requirements and diagnosed queries to improve efficiency in web applications
- Drafted communications between the development and business teams to ensure client satisfaction in final products

PROJECTS

Coursework for AFM 417 "Financial Management of High Growth Companies"

September 2018 – Present

- Worked in a group of 4 students on a 3-month financial consulting project with a local high growth start-up company
- Understood long term goals of CEO to develop a company valuation, revenue model, and business process model

Hack the 6ix

Co-Chair / Business Development Director

December 2017 – Present

- Planned and executed a 48-hour hackathon which drew 1200 applicants, 300 attendees, and 23 sponsors
- Secured \$25,000 in funding by developing a comprehensive sponsorship package including different pledge tiers
- Mentored a team of 3 associates through weekly meetings, delegating tasks, and providing resources
- Strengthened relationships with previous corporate sponsors, and established partnerships with 8 new companies

Independent Investor

July 2017 – Present

- Solely managed a portfolio of \$3,000 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 such as DCF and comparable companies

hEDGE Finance Conference

Associate

September 2015 – September 2016

- 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

Technologies Bloomberg, Capital IQ, Microsoft Suite, Thompson Reuters, Google Cloud Platform, Tableau
Programming Python, R (dplyr, data.table, geojson, leaflet, ggplot), SQL, C, C++, VBA