

Allan Wu

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OBJECTIVE

An experienced Data Analyst and Product Manager with over 10+ years of experience in finance, I am seeking a challenging opportunity to drive business decisions with data with a technology focused organization.

WORK EXPERIENCE

Bank of America Corporation

New York, NY

Vice President, CashPro Product Manager – Data and Strategy

Nov 2020 – Present

- Produce quarterly earnings, KPIs, and insights for Payments business to help drive business decision.
- Manage data and reporting product development in a fast-paced, Agile environment, working closely with developers and stakeholders to ensure successful product and feature launches. Develop roadmap and strategy.
- Partner with Engineering team to develop ETL workflows for CashPro database reporting capabilities expanding data elements for new payment processing systems, API, and additional digital channel features.
- Design and lead team of BI engineers to develop product insight Dashboards.
- Analyzed data and identified clients eligible to receive digital statements, assisted in client conversions to all digital statements in lieu of physical paper statements, resulting in a reduction of over 300K+ statements mailed and helped with firm's ESG goals.

Assistant Vice President, Control room

Jul 2017 – Nov 2020

- Redesigned 6 trade advisory workflows during restructuring. Trained team on new workflows resulting in successful integration.
- Led a team of developers to remediate product tech enhancements and conduct UAT testing.
- Created product solution to remediate Audit Issue. Collaborated with technology to development enhancements to upstream data links and tested reporting tool, resulting in a successful new monitoring process to close out audit issue.

Betterment

New York, NY

Business Success Associate, Betterment for Business

Sep 2016 – Mar 2017

- Work with SQL to pull financial data into Excel to produce ad-hoc metrics and reporting.
- Provided outstanding client support to over 300+ plans and developed strong strong relationships with plan sponsors.

Goldman Sachs Group, Inc.

New York, NY

Associate, Regulatory Audits & Inquiries Compliance

Aug 2013 – Sep 2016

- Project managed regulatory audits and coordinated across divisions, including Trading, Operations, Finance, and Legal, to produce accurate and timely responses to regulatory requests.
- Saved 300+ company research by improving process and creating original threshold analysis database using VBA and Excel.

CIT Group

Livingston, NJ

Compliance Training Analyst (Consultant)

Jan 2013 – Jun 2013

- Managed Compliance class-training program and records for 4000+ employees on Learning Management System.

LEADERSHIP & VOLUNTEER EXPERIENCE

- Leadership Committee, Asian Leadership Network – NY Chapter, Bank of America Jul 2018 – Present
- Volunteer Career Mentor, Skidmore College Career Advisory Network Sep 2013–Present

EDUCATION & TRAINING

Skidmore College, Saratoga Springs, NY

Aug 2011

B.A. Economics, Minors: Mathematics, Management & Business

TECHNICAL SKILLS

- Skills: SQL (Window functions, CTE's, subqueries), Alteryx, Tableau
- Microsoft Office Suite: Advanced Excel (Pivot Tables, V-lookups, and Macros), Word, PowerPoint, and SharePoint