

HUIQI ZHONG

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Qualifications

- Abilities to analyze financial statements, conduct industry research and use statistical software revealed by projects in internship and academic contexts
- Stata, Excel, Word, and PowerPoint expertise applicable to data collection, analysis and presentation projects
- Research, analytical and specialized financial markets knowledge evidenced passing CFA Program Level 1
- Scored 87th percentile worldwide in Bloomberg Aptitude Test
- Experience developing client relationship and selling financial products
- English and Mandarin language fluency with conversational Japanese capabilities
- Currently participating OPT (July 1st, 2014 – June 30th, 2015) and Green Card anticipated June 2015 with full authorization to work in the U.S

Financial Economics Education and Honors

UNIVERSITY OF ROCHESTER

ROCHESTER, NY

Bachelor of Arts Degree in Financial Economics with Minor in Japanese

Graduated May 2014

- Cumulative GPA of 3.83/4.00; Dean's List 6 of 6 eligible semesters
- Financial Economics Council Secretary (Fall 2012 – Spring 2014)
- Compass To Personal Leadership Program, Second Year Member (Fall 2012 – Spring 2014)

UNIVERSITY OF WISCONSIN MADISON

MADISON, WI

Completed Freshman Year Requirements Prior to Transferring

Fall 2010 – Spring 2011

- Chinese Undergraduate Students Association Finance Treasurer (Fall 2010 – Spring 2011)

Coursework and Projects

Financial Management, Financial Accounting, Managerial Accounting, Investments, Econometrics, Economics of Organizations, Intermediate Macroeconomics and Microeconomics, Economic Statistics, Industrial Organization, Economics of Globalization, Linear Algebra, Game Theory, Principles of Marketing

- **Econometrics Project:** Used Stata to create econometric model to analyze the effect of substance use on three thousand plus high school students in the United States. Presenting findings in written paper, charts and graphs.
- **Principles of Marketing Project:** Conducted primary and secondary market research to create marketing plan to launch a hypothetical butter knife product to be sold in Taiwan. Analyzed competitive pricing, competitors and market segmentation. Presenting by PowerPoint in classroom and in written paper.
- **Investment Project:** Analyzed stock price data using Matlab to study impact of momentum investment strategy.

Financial Services Internship Experiences

GUOSEN SECURITIES CO., LTD

SHENZHEN, CHINA

Summer Intern

June 2013 – July 2013

- *Guosen Securities Co., LTD has the second largest market share of 8.8 percent in domestic equity offerings*
- Conducted industry research and compiled China Mainland IPO Pitch Book for Auctus, a domestic firm selling wireless communication equipment
- Organized personnel records and assisted in building new corporate website
- Drafted brochure of financial products and services provided by Investment Banking Department

CITI GOLD – SHENZHEN FUTIAN BRANCH

SHENZHEN, CHINA

Assistant to Client Relationship Manager

July 2012 – August 2012

- *Provides premier private banking and wealth management services*
- Attended two-week wealth management training that reviewed exchange rates, trends, financial statements, and economic policies of various countries
- Analyzed Australian Dollar to U.S Dollar and identified exchange rate trends to be used by management in offering wealth management product to customers
- Researched Henderson Global Technology Fund, an investment fund only offered by Citi Bank in China, and created client promotional brochures

CHINA INTERNATIONAL FUTURES CO., LTD

SHENZHEN, CHINA

Assistant to Future's Analyst

June 2012

- *Leading commodities, futures and financial brokerage firm in China*
- Updated commodities futures price daily and assisted in organizing Client General Assembly meeting