

MIAO CHI

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SKILLS

- Experienced in MS Outlook, Word, Excel(VBA/macros, pivots, vlookup, cross-referencing modeling), PowerPoint, Access, Visio(UML), My SQL and SAS for financial planning & analysis, database management, information retrieval, decision support and project management
- Proficient in financial modeling, scenario/valuation analysis; SDLC methodologies; trading supporting; FactSet & Bloomberg terminals
- Strong communication, professional presentation, interpersonal, teamwork, problem solving, organizational and leadership skills
- Bilingual in English(Fluent) and Mandarin(Native)

EXPERIENCE

JPMorgan Chase & Co.

10/13-04/14 New York, NY

Financial Business Analyst, Operation Group

- Participated in over 20,000 accounts project for preventing insider transactions and monitoring personal securities trading activities, review periodic internal statements to ensure trade information, identify potentially suspicious activities, and pre-clearances verified
- Tracked project deliverables and provided on-going and in-depth analysis for manage risk, issues and data quality control by setting up matrix using advanced excel skills (macro, vlookup, pivots, etc.) to organize data to ensure compliance procedures was executed properly
- Assisted with the implementation of teams' remediation daily report template and managed other upcoming regulatory requirements followed the Basel II and CCAR to evaluate institutions' capital adequacy such as dividend payments or stock repurchases when needed
- Generated daily Accountability Report with post-data-processing summaries of extreme accuracy on details, and conducted researches on derivatives strategies, alternative investments and fixed income financial transaction regulation to ensure the timely pre-approval and reconciliation of personal trades, including reporting of breaches, checking of records; Collected documented data, including issuance of violation notification, communicate with AML Investigations units to effectively transfer information for assisting case investigation

IBM

06/13-09/13 Somers, NY

Summer Financial Business Analyst, CIO team

- Participated in Data Integration project at Analytics team to create Business Case(executive summary, financial metrics, benefit-cost analysis, etc.) for over 200+ Database consolidation; Communicated the design with IT teams to identify business needs & capabilities
- Conducted financial/budget analysis, designed report, engaged in application and services implementations, gathered requirements and liaised between finance, business and technology teams as well as delivered the final presentation to executive level for decision making
- Gathered updates from PDTLs of latest forecast of benefits and created 1Q of 2014 forecast templates monthly for investment and benefits, and calculated initiative benefits based on proposed 2013 actuals/forecast and 2014 requirements, using advanced excel skills(pivots, etc.) to manage data flow, monitor errors, investment control, and generate reports for financial statement preparation
- As Project Coordinator gathered updates & feedback from teams and proactively communicated project status, issues & risks to management, assisted manager coordinated team meetings, scheduled project process calendar and confirmed scope for project strategies

New York Life Insurance Co.

04/13-06/13 New York, NY

Finance & Accounting Intern

- Evaluated 50+policy holders' financial capability and prepared investment proposition for Fixed Income investment applications
- Gathered financial data and management entries into SAP general ledger and calculated annuity to process P2P investment requests
- Facilitated journal entries, invoicing and account reconciliations by utilizing excel skills to increase information process efficiency

Better Business Bureau

11/12-02/13 New York, NY

Business Disputes Coordinator

- Assembled and managed market-oriented information issues utilizing corporate database and generated reports, which across 400+ deals ranging from smart billing overcharge, delay payment, credit card issues to senior-level issues and settled disputes through mediations
- Analyzed contracts to determine validity of claims and help clients make decisions, to enhance business and consumers relationships

Industrial and Commercial Bank of China

12/11-05/12 Beijing, China

Credit Risk Analyst, Commercial Loan Center

- Reviewed and analyzed credit data, financial statements, annual reports, company evaluation, P&L statements and KYC information to evaluate borrowers' credit risk, repayment ability and recommended payment plans based on earnings, payment history, debt ratio, and performance forecasts; Conducted due diligence on loan request, familiar with banking credit policies/procedures and risk regulations
- Completed 200+ loan applications, including credit analyses and summaries of loan requests, and submit to loan committees for approval

Bank of China

06/10-09/10 Beijing, China

Equity Research Analyst, Wealth Management

- Prepared research reports on various investment products and completed portfolio management to meet over 50+ clients' financial targets
- Assisted financial advisors by conducting equity researches on stock markets and identifying potential market risks and opportunities

EDUCATION

FORDHAM UNIVERSITY, GRADUATE SCHOOL OF BUSINESS ADMINISTRATION, New York, NY

Master of Science in Business Enterprise, May 2013

CHINA WOMEN'S UNIVERSITY, Beijing, China

Bachelor of Economics in Finance, June 2012