Zhongwei Chao (Jack)

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Education

➤ Rider University, NJ, US

   Master of Accountancy   09/2011- 05/2014   GPA:3.51

➤ Jiangxi University of Finance and Economics, China

   Master of Business Administration （Concentration: Marketing） 09/2006-01/2009 GPA:3.45

   Bachelor of Science in Business Administration   09/2001-07/2005

Working Experience

SAFDAR, C.P.A. Firm, Ewing, NJ   01/2013-03/2013

Accounting Intern

➤ Processed and prepared payroll tax returns.
➤ Reconciled bank accounts.
➤ Recorded accounting information by using Quickbooks.

Chartis Finance of AIG, NYC   08/27/2012-12/31/2012

Accounting Intern

➤ Checked client's reinsurance contracts. Prepared quarterly activity summary sheet and premium/loss statement.
➤ Calculated the quarterly interest payment for each contract.
➤ Prepared quarterly reports for each contract.

Moore Library of Rider University, NJ, US   09/2011-08/2012

Librarian Aide

➤ Made tutorials by using Adobe Captivate; Assisted professors to do research.

Jiangxi Post Saving Bank, Jiangxi, China   01/2009-08/2011

Assistant Sales Manager

➤ Built and maintained the relations with fund companies and insurance companies. Shared financial market information and set the sales plan with those companies
➤ Trained the sales person to let them know the features of each financial product.
➤ Managed the sale process to achieve the sales goals and collected the sales data.
➤ Prepared daily, weekly, monthly profit analysis, and reported to director.
➤ Carried out Customer needs survey, and ensured outstanding customer satisfaction.

Kaimai Management Consulting Firm, Hanzhou, Zhejiang, China   06/2008-11/2008

Market Research Intern

➤ Supported development of survey questionnaire, survey design.
➤ Data collection and analysis.

CPA EXAM
FAR: 84   AUD: 5/29/2014   BEC:N/A   REG:N/A

Core Skill
Client Relations •Communication and Presentation •Data collection and analysis •Market Research
Adobe Captivate• Proficient in Excel •Quickbooks