

Qi (Tina) Zhang, CPA

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EDUCATION

• University of Illinois at Urbana-Champaign

Urbana, IL

M.S. in Accountancy, Major concentrated in Data Analytics; GPA: 3.97/4.0

May 2018 – May 2019

Highest Academic Distinction Award, Circle of Excellence Award

• Shandong University of Finance and Economics (SDUFE)

Jinan, Shandong, China

B.Mgt. in Accountancy; GPA: 3.23/4.0

Sep. 2008 – Jun. 2012

First-class Scholarship, Outstanding Student Cadre

WORK EXPERIENCE

• Morgan Stanley

Baltimore, MD

Equity Derivatives Associate

Jun. 2020 - Jan. 2022

- Implemented pricing models for equity derivatives products, using quantitative techniques and statistical analysis to accurately price options, swaps, and other complex instruments, ensuring alignment with regulatory requirements.
- Monitored and managed risk associated with equity derivatives products by tracking market trends, analyzing volatility patterns, and identifying potential portfolio risks to implement timely mitigation strategies.
- Ensured accurate recording of trades, thorough reconciliation, and timely, precise financial reporting.
- Worked with traders, operators, and controllers to collaboratively price and hedge equity derivatives products, taking into account market trends, risk factors, and regulatory compliance to ensure optimal trading strategies.

Balance Sheet Controller Associate

Oct. 2019 - Jun. 2020

- Managed MSBNA and MSPBNA's daily, weekly, and monthly balance sheet disclosure reports, analyzing significant week-on-week movements to identify trends and potential areas for financial improvement.
- Engaged in the preparation and analysis of Treasury International Capital (TIC) reports, actively participated in weekly, monthly, and quarterly due diligence meetings with cross-functional teams, and assisted the manager in compiling and submitting comprehensive financial reports to the Federal Reserve.
- Assisted in training the Morgan Stanley Budapest team, transferring bank reporting business processes, and creating reference procedures to ensure a smooth transition and alignment with global standards.

• Pan-China Certified Public Accountants

Jinan, Shandong, China

Auditor

Nov. 2016 - Jan. 2018

- Engaged in fixed assets inventory management for over 20 companies, meticulously checking accounting vouchers, sending confirmation letters to banks, and filing working papers to ensure accuracy and regulatory compliance.
- Communicated effectively with clients to gather essential financial information and address the problems identified in inventory valuation methods, depreciation calculations, and expense accounting practices.

• China CITIC Bank

Jinan, Shandong, China

Financial Manager

Oct. 2014 - Oct. 2016

- Managed relationships with over 200 VIP clients with assets exceeding half a million RMB, focusing on client satisfaction and retention through regular communication and portfolio monitoring.
- Provided tailored financial advice and product configuration for VIP clients, aligning strategies with individual investment goals, risk tolerance, preferences, and long-term financial objectives.

Corporate Accountant

Jul. 2012 - Oct. 2014

- Operated corporate daily settlement processes, managed foreign capital settlement transactions, conducted corporate accounts' checking, and performed annual auditing for over 100 companies, ensuring compliance.
- Collected and analyzed suspicious transaction data for anti-money laundering (AML) compliance, and reported irregularities to the China Central Bank in line with regulatory guidelines.

CERTIFICATES

CPA Certificate , CFP Certificate, Passed CFA level II, [Google Data Analytics Certificate](#)

SKILLS

- **Languages:** English (Fluent), Mandarin Chinese (Native)
- **Technical:** Microsoft Office Suite, Excel, Outlook, Python, SQL, R, Tableau, Minitab, Git