

Qi (Tina) Zhang, CPA, CFP

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PROFILE

Financial professional with over 7 years of experience in problem-solving, strategic planning, and financial management, complemented by an M.S. in Accountancy with a specialization in Data Analytics. Demonstrated expertise in equity derivatives, P&L reporting, and balance sheet control, along with a strong acumen for leveraging data analytics tools for informed financial decision-making and regulatory compliance.

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.
 - Conducted audits within ERP environments to ensure regulatory compliance and identify cost-saving opportunities. Utilized real-time data analysis for accurate reporting and strategic decision-making.
- **China CITIC Bank** Jinan, Shandong, China
Financial Manager Oct. 2014 - Oct. 2016
 - Led a client relationship team focused on servicing over 200 VIP clients, each with assets exceeding six million RMB; implemented client retention strategies and spearheaded regular portfolio reviews, resulting in a 15% increase in client retention and a 20% uptick in overall client satisfaction rates within one fiscal year.
 - 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.

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 Sep. 2008 - Jun. 2012
First-class Scholarship, Outstanding Student Cadre

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, SAP, Yonyou, Kingdee, Python, SQL, R, Tableau, Minitab, Git