

Ella Fan

FINANCIAL ANALYST

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"Dedicated and detail-oriented Financial Analyst, lead to team's success."

Summary

Thorough and meticulous Financial Analyst passionate about helping businesses succeed. 5 years as a finance professional, with 3 years in financial analysis. Experienced with financial modelling using excel and conducting quantitative and qualitative data analysis using SQL, R, Python. Highly educated, recipient of a Bachelor's degree and professional certification in finance and data analysis. Focused on continual professional and personal growth, including the improvement of business and economic knowledge. Former Credit Analyst and CFA level III Candidate.

Skills

Financial

- Statistical analysis, Cost accounting, Corporate finance knowledge, Financial modeling, Budgeting, Expense tracking
- Risk management, Accounting, Economics, Business performance analysis, Trend analysis, Asset management

Computer Science

- Advanced Microsoft Excel functions, Tableau, Python (Pandas, Matplotlib, NumPy, SciPy), R (RStudio), MS Project
- Office Automation (OA), Customer Relationship Management (CRM)

Soft Skills

- Logic and analysis, Problem-solving and troubleshooting, Pattern and trend identification, Efficiency
- Clear writing and report writing, Critical thinking, Attention to detail, Decision-making, Teamwork & collaboration

Work Experience

ITalkBB Canada Inc.

BUSINESS ANALYST

Richmond, BC

Jul. 2019 - Now

- Created pivot tables and charts to achieve analytical goals.
- Designed, recorded and executed macros to automate data entry inputs.
- Increased customer satisfaction rates through CRM system for marketing team.
- Utilized an OA system to gather data for work orders and coordinated plans for 30 employees.

Volkswagen Finance.

CREDIT ANALYST

Jan. 2013 - Jun. 2015

- Analyzed financial data (budgets and income) with consideration for the company's goals.
- Improved existing and created new products to push the company's finance results
- Completed dealer's financial analysis and converted data into actionable insights.
- Used SQL & Advanced Excel to track and analyze sales, industry rankings and payment records data.
- Developed key risk indicators to monitor financial risks and decreased costs by 8%.
- Utilized Tableau, and SSRS dashboard/visualization tools for data intelligence and analysis.

Heng An Standard Life Insurance Co.

INVESTMENT ACCOUNTING

Sep. 2011 - Dec. 2012

- Synthesized and analyzed process bonds, funds, assisted in analysis of investment products.
- Responsible for investment valuation, calculated investment price and assets.
- Generated reports, charts, and tables on cash flow statement, balance sheet, income statement.
- Tracked actual financial results, compared and corrected data in regards to transactions.
- Recommend, developed rules and projects that improving team competitive position.

Shenzhen Development Bank.

ACCOUNT MANAGER

Jul. 2008 - Aug. 2011

- Audited client financial needs, wrote investigation reports, complete credit rating.
- Collected and provided necessary info for credit decisions, solved problems found in vetting.
- Communicated and coordinated project discussions and inspected the assessment for credit risk.
- Responsible for loan management work, regular loans, tracked usage per customer.
- Managed 3 big projects that had over 30 enterprise customer loans.

Certificates

CFA LEVEL 3 CANDIDATE

2014 **CFA Level II Passed,**

Education

BCIT(British Columbia Institute of Technology)

Vancouver, BC

APPLIED DATA ANALYTICS WITH DISTINCTION: CERTIFICATE, GPA 88%

Jun. 2016 - Jul. 2019

- COMP 2256 - Visual Analytics for Business Intelligence with Tableau.
- MATH 3060 - Advanced Statistical Techniques for Data Analytics (Grade: A+ 96).
- COMP 3838 - Data Warehouse Foundations for Business Intelligence (Grade: A 92).
- COMP 4679 - Business Intelligence with SSRS, SQL Server Reporting Services (Grade: A 93).
- COMP 4681 - Business Intelligence with SSAS, SQL Server Analysis Services (Grade: A+ 97).
- COMP 1288 - IT Project Management. MATH 1060 - Statistics for Data Analysis.
- COMP 3704 - Applied IT Security Fundamentals. COMP 1630 - Relational Database Design and SQL.
- COMP 3840 - Introduction to Big Data and Hadoop. COMP 2831 - Business Analysis and Systems Design.
- COMP 3839 - Data Quality Improvement (Grade: A 92). COMP 2362 - Microsoft Excel Advanced (Grade: A 93).
- COMP 2854 - Data Analytics Fundamentals (Grade: A+ 96). COMP 4254 - Advanced Topics in Data Analytics (Grade: A 91).

NKU(Nankai University)

B.S. IN FINANCE