

# 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 advanced excel and conducting quantitative and qualitative data analysis using SQL. 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. Completion of Canadian Securities Course 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

- Relational databases (SQL Server), Advanced Microsoft Excel functions, Math (statistics and probability), Regression analysis
- Enterprise resource planning (ERP) systems, Tableau, Python, R (RStudio), MS Project
- Data mining, Database design and management, Business intelligence (BI), Data warehousing, SSAS, SSRS

### Soft Skills

- High degree of accuracy, Attention to detail, Communicate effectively both orally and in writing, Interpersonal skills
- Multitasking, Enthusiasm, Critical thinking, Decision-making, Problem-solving, Risk management, Process improvement
- Training and instructing, Teamwork & collaboration, Creativity, Leadership, Time management

## Work Experience

### Volkswagen Finance.

CREDIT ANALYST

Jan. 2013 - Jun. 2015

- Completed dealer's financial analysis and ensured workflow processes are followed.
- Used SQL & Advanced Excel to track and analyze sales and payment records data accurately.
- Coordinated with dealers to push finance results and help gaining efficiencies in workflows.
- 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
- Provided sales and management support for various tasks in daily jobs.
- 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,

### SAS ADVANCED

## Education

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### **BCIT(British Columbia Institute of Technology)**

*Vancouver, BC*

APPLIED DATA ANALYTICS: PART-TIME, CERTIFICATE

*Jun. 2016 - Aug. 2019*

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

### **NKU(Nankai University)**

B.S. IN FINANCE