

# **Yanzhe (Jason) Zhang**

(469) 226-5709 | [yzwzmzr4@gmail.com](mailto:yzwzmzr4@gmail.com) | [linkedin.com/in/jasonzhang99/](https://linkedin.com/in/jasonzhang99/) | [yzcfzs.github.io](https://github.io/yzcfzs.github.io)

## **EXPERIENCE**

### **Securities Transfer Corporation**

Plano, TX

Operations Associate

July 2025 - Present

- Process and record high-volume securities transactions, including stock and bond issuances and transfers while ensuring compliance with transfer agency policies and regulations
- Deliver professional and timely support to corporate issuers, brokers, and shareholders, ensuring prompt resolution of inquiries and transfer requests
- Work closely with the accounting department to maintain accurate billing, prompt sales order invoicing, and organized record keeping

### **Southern Methodist University**

Dallas, TX

Teaching Assistant for ITOM 6252 Decision Models

August 2025 – October 2025

- Provided academic support by grading assignments, refining course materials, and conducting office hours to facilitate student success

## **EDUCATION**

### **Southern Methodist University, Cox School of Business**

Dallas, TX

*Master of Science in Business Analytics*

May 2025

Cumulative GPA: 3.98/4.00

Honors: Merit Scholarship, Beta Gamma Sigma Member, Alpha Iota Delta Member

### **University of Waterloo**

Waterloo, ON, Canada

*Bachelor of Mathematics in Financial Analysis and Risk Management*

June 2024

Cumulative GPA: 81.3/100.0

Honors: President's Scholarship

## **TECHNICAL SKILLS**

Python, R, HTML, CSS, JavaScript, SQL, React, Excel, Word, PowerPoint, Linux, Bloomberg Terminal, Power BI, FactSet, Tableau, Alteryx, KNIME, Azure, MySQL, DTCC PBS, Sage, MIMICS

## **PROJECTS**

### **Oracle Customer Trigger Analysis Capstone Project**

January 2025 - April 2025

Team Leader

### **2025 American Airlines and SMU ITOM Case Competition**

January 2025 - February 2025

Finalist

### **St. Philip's Performing Arts Center Business Consulting Project**

December 2024 - April 2025

## **CERTIFICATIONS**

### **Passed Chartered Financial Analyst Program Level III Exam**

October 2025

### **Microsoft Office Specialist Expert Certification**

October 2024

### **Microsoft Power BI Data Analyst Associate Certification**

January 2025

### **Bloomberg Market Concepts Certification**

July 2023

### **FactSet Essentials Certification**

October 2024

### **Oracle Certified Professional, MySQL 8.0 Database Administrator**

July 2025

### **Oracle Certified Professional, MySQL 8.0 Database Developer**

July 2025

## **ADDITIONAL INFORMATION**

**Languages:** Native Fluency in Mandarin Chinese

**Activities:** Volunteer at United Way, Eco Fair at the Barns, Toronto Marathon, North Texas Food Bank

**Awards:** SMU Business Leadership Center Cox Legacy Award