

# Master of Financial Economics (MFE)

## Resume Book 2019 Interns



**Western**  
UNIVERSITY - CANADA

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# Master of Financial Economics Internship Program

MFE students offer strong quantitative and communication skills acquired through graduate level studies in economics, financial modeling, corporate finance, and securities regulation.

## Internships:

- A minimum 10 to 16 weeks of mentored full-time work
- Salaries ranging between \$15,000 and \$30,000/term
- Students are prepared to relocate
- An official program requirement

## MFE Commitment to Employers:

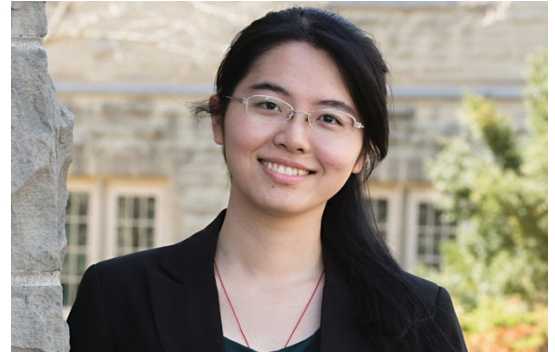
- Flexible job posting timelines
- Program targeted job board
- Resume bundling services
- Interview scheduling support
- Provincial tax incentives and MITACS; contact us for more information

## Interns will:

- Augment classroom learning in a professional environment
- Improve understanding of current financial issues
- Acquire experience with professional reports and presentations
- Expand professional network

## Internship milestones:

- MFE Program conducts a mid-internship review (phone)
- Supervisors complete an online end-of-term survey
- Interns complete an end-of-term survey, written report, and oral presentation to MFE peers



*Fan Yang, MFE'15  
RBC, Senior Manager, Market Risk Models, Group Risk Analytics  
Summer 2015 intern at RBC Global Asset Management*



*Abhishek Ashok, MFE'15  
Portfolio Analyst, Highstreet Asset Management  
Summer 2015 intern at Highstreet Asset Management*



*Teodora Vujicic, MFE'15  
Associate, Treasury & Balance Sheet  
Management, TD Bank  
Summer 2015 intern at the Bank of Canada*

# MFE 2014-2018 Employment Report

Western's Master of Financial Economics (MFE) Program educates financial professionals and 100% have received summer internship offers since our launch in 2013.

## Internship Employers

- AIMCO
- Allianz Global Investors
- Bank of Canada
- BMO
- CIBC
- Canada Pension Plan Investment Board (CPPIB)
- CI Investments
- Deloitte
- Desjardins
- Fiera Capital
- GLC Asset Management
- Goldman Sachs
- Government of Canada
- Highstreet Asset Management (AGF)
- LifeLabs
- Manulife Asset Management
- Moneris
- National Bank
- OMERS
- Ontario Teachers' Pension Plan (OTPP)
- OP Trust
- PSP Investments
- Paradigm Capital
- RBC
- RBC Global Asset Management
- Roynat Capital
- Scotiabank
- TD

## Function Areas

- Risk management · Treasury · Portfolio management · Capital markets · Economic research

## Highlights

### Internship Roles

- Associate – *Quantitative Risk Modeling, Global Risk Management, Scotiabank*
- Investment Analyst – *Beta Portfolio Department, OMERS Capital*
- Analyst – *Financial Markets, Bank of Canada*
- Intern – *Total Portfolio Management, CPPIB*

### Full-Time Placements

80% of MFE graduates have secured full-time employment within four months of graduation at firms including:

- Manager – *Model Validation, Scotiabank*
- Associate – *Global Risk Management, Scotiabank*
- Associate – *Treasury, TD*
- Senior Valuation Analyst – *Capital Markets, TD*
- Fixed Income Trade Support Analyst – *BMO*
- Investment Risk Analyst – *Wealth Management, CIBC*
- Financial Risk Management Analyst – *Validus Risk Management*

# SAMI AL-SHALCHI

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## CORE COMPETENCIES

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- Solid understanding of global economics and finance
- CFA Level II Candidate with strong intellectual curiosity
- Proficient in Matlab/R/VBA and Bloomberg
- Ability to deliver in a fast paced environment
- Languages: English, Arabic, Italian
- Excellent Interpersonal and teamwork skills

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## EDUCATION

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<b>Master of Financial Economics candidate</b> Western University, London, Ontario	<b>09/2017 – 04/2019</b>
<ul style="list-style-type: none"><li>• Recipient of the High Street Asset Management scholarship for being the top performing in the MFE program for 2018</li></ul>	
<b>CFA Level II Candidate</b>	<b>06/2019</b>
<b>BA Honours in Economics, Summa Cum Laude</b> York University, Toronto, Ontario	<b>06/2017</b>
<ul style="list-style-type: none"><li>• <i>summa cum laude</i> (Last two years: GPA 3.9/4, CGPA 3.82/4)</li><li>• Scholarships: George Doxey Award in Economics (offered to one student per year), Dean's Circle of Student Scholars</li><li>• Leadership: Vanier Peer Mentors, Golden Key Society</li></ul>	
<b>Excel Crash Course, Wall Street Prep</b>	<b>10/2016</b>

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## EXPERIENCE

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<b>Global Macro &amp; Currencies Internship, PSP Investments, Montreal, Quebec</b>	<b>04/2018 – 08/2018</b>
<ul style="list-style-type: none"><li>• Worked on the development, back testing and programming of PPP and BEER valuation models that are to be used in a fund wide dynamic currency hedging program</li><li>• Conducted valuation and analysis of S&amp;P500, MSCI EAFE &amp; EM, and S&amp;P/TSX Indices to feed the public markets equity allocation decision for 2019</li><li>• Conducted a thorough academic literature review on equity index valuation metrics the conclusion of which resulted in the revision of previous long-term fund assumptions</li></ul>	
<b>Fixed Income &amp; Currencies Internship, Ontario Teachers' Pension Plan, Toronto, Ontario</b>	<b>01/2018 – 04/2018</b>
<ul style="list-style-type: none"><li>• Active involvement in the day-to-day management of \$5bln emerging markets local currency portfolio tracking the JPM GBI-EM</li><li>• Contributed to investment analysis by publishing weekly emerging markets commentary sent to the entire capital markets team</li><li>• Updated and improved a credit default swap excel dashboard that is used by the portfolio manager in making trading decisions</li></ul>	

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## LEADERSHIP EXPERIENCE

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<b>Vanier Peer Mentor, York University</b>	<b>08/2016 – 05/2017</b>
<ul style="list-style-type: none"><li>• Offered tutoring for introductory math and economics courses</li><li>• Mentored junior students on time management, discipline, and independent learning</li><li>• Hosted, organized and tutored in exam and midterm review sessions to over 100 Economics students</li></ul>	

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## SKILLS, ACTIVITIES AND INTERESTS

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**Technical Skills:** Proficient in Matlab, R, VBA, Bloomberg, DataStream and Excel. Currently learning Python

**Certificates:** Corporate Finance Institute: Financial Modeling, Advanced Excel, Valuation and Analysis

**Reading:** Misbehaving: Story of Behavioral Economics, Global Macro Trading: Profiting in a New World Economy

**Activities:** Skydiving (GFP license *in progress*) and Soccer

**Wenzile Ben** | 519-282-3768 | wben@uwo.ca  
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## **SUMMARY OF QUALIFICATIONS**

- Effective analytical, quantitative and problem-solving skills developed through work and academics
- Strong interpersonal and communication skills gained from public speaking and classwork
- Detail oriented individual who thrives in a collaborative team environment
- Proficient in R, Visual Basic, Bloomberg and Microsoft applications (Excel, Word, and PowerPoint)

## **EDUCATION**

- Master of Financial Economics Candidate, Western University AUG 2018 – DEC 2019  
**Courses:** -Financial modelling -Corporate finance -Financial econometrics -Macroeconomics
- Bachelor of Arts in Financial Economics, Western University SEPT 2014 – APR 2018
- Certificate: Bloomberg Market Concepts (BMC)

## **WORK EXPERIENCE**

### **TD CANADA TRUST-EASYLINE SPECIALIST MAY 2018- AUG 2018**

- Solved customer problems using effective communication skills through active listening and asking relevant questions resulting in an exceptional service delivery of 92%
- Worked in a team to enroll customers in a new authentication tool which led to the highest enrolments for the team in the London location
- Used systematic and verbal cues to identify customer needs and advise customers on choices of accounts and other TD products (digital, credit), resulting in over 100% in sales revenue

### **TOYOTA-CUSTOMER SERVICE REP APR 2016- AUG 2016**

- Achieved greater efficiency by promptly answering customer questions in person and via telephone
- Employed effective problem-solving skills to de-escalate and resolve issues with delayed orders
- Helped achieve 100% sales goals by prospecting for new customers through research

### **MOTOW-TUTOR NOV 2013-JUNE 2014**

- Employed quantitative skills to tutor high school students in the fields of mathematics and physics
- Attained a 100% pass rate by effectively preparing and delivering material to students

## **EXTRACURRICULAR EXPERIENCE**

### **PEER GUIDE - WESTERN UNIVERSITY SEPT 2017 - PRESENT**

- Welcome and assist new international and exchange students in their adjustment, orientation, and transition to Western University and the Canadian way of life
- Lead a group of 7 international students to help identify services suited for their needs
- Plan and organize events and activities for international and exchange students

### **CFA INSTITUTE RESEARCH CHALLENGE- WESTERN UNIVERSITY SEPT 2018- PRESENT**

- Training in financial analysis and research through an equity research case competition
- Working in a group of 5 to research and report on a publicly traded company as well as offer investment recommendation

## **INTERESTS**

- Travelling; Weight lifting; Reading blogs

# SANKARA BLOT

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[sblot2@uwo.ca](mailto:sblot2@uwo.ca)

## QUALIFICATIONS

- Strong quantitative background with excellent problem solving skills
- Proficient in SQL, R, Stata, Python, Scheme and Microsoft Office
- Experience working independently and within multidisciplinary teams
- Bilingual in French and English (French native speaker)

## EDUCATION

University of Western Ontario Expected 2020

**Master of Financial Economics Candidate**

University of Waterloo (UW) 2011-2015

**Bachelor of Mathematics, Honours Statistics with Minor in Economics**

## WORK EXPERIENCE

Global Affairs Canada-International Assistance Operations Bureau, Ottawa, Ontario January 2019-Present

**Junior Analyst (Co-Op)**

- Analyzing and improving approved strategic policies on processes related to grants and contributions.
- Supporting the development of tools related to funds programming and the implementation of international assistance initiatives.
- Compiling key statistics and creating reports to support operational analysis.

Morneau Shepell, Toronto, Ontario July 2017-June 2018

**Pension Analyst**

- Supported daily reconciliations of cash/unit balances in transactions, which ensured accuracy in trading and record keeping.
- Confirmed daily trades of \$10,000-\$100,000 CAD and verified payments sent to financial institutions or individual plan members.
- Conducted regular regression testing in a UAT environment to identify potential issues.
- Compiled data used in timely quarterly management reports and tax slip generation.
- Provided standard and ad-hoc reports for external clients.

Fidelity Investments Canada, Toronto, Ontario November 2015-July 2017

**Advisor Service Centre Representative**

- Provided complete account information and insights on Canadian Registered Savings Plans (RRSPs, LIRAs, RESPs), Income Plans (RRIFs, LIFs, LRIFs) and Non-Registered Plans to clients and financial advisors, resulting in increased customer satisfaction.
- Reviewed forms to identify discrepancies in transactions and collaborated with internal business groups to resolve account related issues.
- Safeguarded the integrity of accounts by authenticating individual callers using defined security protocols, thereby reducing potential privacy breaches.
- Processed letter requests and replied to emails sent to the company's inbox in a timely fashion, thereby significantly improving the department's response time.

## ADDITIONAL ACTIVITIES

**Leadership** UW Association of Caribbean Students-First Year Representative

**Reading** The Economist, The Huffington Post, *Who Moved My Cheese*

**Interests/Sports** World politics, Tennis, Track and Field

## Michelle (Ka Yee) Chan

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### SUMMARY OF QUALIFICATIONS

- ◇ Two years of professional work experience in financial services as a Business Analyst and Project Coordinator
  - ◇ Strong analytical skills with ability to analyze and interpret market research, financial data and allocation reports
  - ◇ Strong verbal and written communication skills demonstrated through work experience
  - ◇ Knowledge of Project Management techniques, tools, business analysis and the Software Development Life Cycle
  - ◇ Experienced in Advanced Excel, VBA, PowerPoint, Visio, Project, SharePoint, SAS and R
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### EDUCATION

**Master of Financial Economics Candidate**, Western University Sept 2018-Dec 2019

- Bloomberg Market Concepts Certificate
- CFA Institute Research Challenge (Case Competition)
- Courses: Corporate Finance, Portfolio Management, Financial Options, Econometrics, Financial Modelling, Financial Economics

**Bachelor of Arts with Dean's Honours List & Distinction**, University of Waterloo,  
Honours, Co-operative Program, Economics & Business with a Finance specialization Sept 2013-Apr 2018

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### WORK EXPERIENCE

**Project Coordinator**, Manulife Financial (Investment Division) Jan-Aug 2017

- Produced weekly allocation reports for the Assistant Vice President, tracked and allocated the Development and Quality Assurance teams to appropriate project request demands, utilizing Excel skills.
- Created complex MS Visio context diagrams outlining system integration points for a multimillion-dollar transformation program, System Integration Testing (SIT).
- Demonstrated initiative by assisting other teams on project budgeting and consolidating business requirements.

**IT Project Control Coordinator**, CIBC (Business & Corporate Banking Technology) May-Aug 2016

- Worked with senior project managers on multimillion-dollar projects to ensure that deliverables are executed.
- Supported the project team by scheduling and planning meetings, documenting minutes, preparing management reports, and following up on action items.
- Researched and presented on a FinTech company to Senior Executives, providing valuable recommendations to help the bank improve small business banking experience as part of Co-op team initiative.

**Associate Business Analyst**, Scotiabank (Risk Management Information Technology) Sept-Dec 2015

- Collaborated with application Business Analyst teams to gather and document requirements to ensure that deliverables were successfully met.
- Analyzed, gathered, and documented processes and business requirements on multiple projects to meet the needs of the Corporate Governance standards and requirements.
- Created a detailed Business Continuity Plan document for the department, including roles and responsibilities, and an extensive analysis of the procedures for all phases of the business recovery.

**Project Administrator**, Scotiabank (Scotia iTRADE) Jan-Apr 2015

- Conducted competitive market research analysis to identify opportunities related to opening new accounts.
  - Developed process maps to analyze and improve on processes using MS Visio.
  - Tracked key performance metrics for the Call Centre to graph results for management reporting in Excel.
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### EXTRACURRICULAR

**Volunteer**, Second Harvest July 2017

**Volunteer**, Juvenile Diabetes Research Foundation (JDRF) October 2015

**Interests:** Studied ballet for 15+ years; jogging; soccer; read current news and Financial Post

# Amy (Xiaoyue) Chang

309 - 190 Cherryhill Circle, London, ON N6H 2M5 778 922 1573 xchang43@uwo.ca

## PROFILE

- Strong quantitative and qualitative analysis skills developed through using statistical tools and building analytical models to identify investment opportunities
- Significant experience in bookkeeping, financial modelling, and financial and managerial accounting
- In-depth knowledge of Microsoft Excel and PowerPoint, working knowledge of R, SAS, and Bloomberg

## EDUCATION

**Master of Financial Economics**, Western University Aug 2018 - Present

- Courses: Portfolio Management, Financial Modelling, Econometrics, and Financial Options

**Bachelor of Commerce**, Gustavson School of Business, University of Victoria Sept 2013 - Apr 2018

- Academics: 7.9/9 Cumulative GPA with A+ in Economics, Accounting, Finance, Statistics, Calculus, and Business Analysis
- Awards: Dean's List Certificate; Peter B. Gustavson School of Business Entrance Tuition Scholarship; President's Scholarship; University Pathway Program Scholarship
- Teamwork: participated in more than 20 team projects; led teams to complete RBC competition, KMPG stimulation, and Global Portfolio stimulation successfully

## WORK EXPERIENCE

**Accounting & Administrative Assistant**, Carbon Engineering Ltd., Squamish, BC May - Dec 2017

- Applied core finance and accounting concepts by preparing payroll, general ledger account and bank account reconciliation, and monthly, quarterly, and annual financial statements
- Performed statistical analysis on monthly utility utilization of the current plant and designed an Excel tool to predict future utility consumption of a larger plant
- Prepared documents for financial audits and helped the company gain innovation funding from both Canadian government and U.S. government as a member of the finance team

**Customer Service Representative**, Dockside Gifts, Victoria BC May - Sept 2016

- Formed a strong bond and family atmosphere among all the co-workers by cooperating with them closely
- Handled urgent situations and challenging customers calmly, patiently, and effectively through great communication and problem-solving skills
- Discovered sales opportunities in the conversation with customers and referred customers to appropriate store based on their needs

## VOLUNTEER EXPERIENCE

**Team Leader**, Community Volunteer Income Tax Program Feb - Apr 2017

- Conducted interviews for potential volunteers and scheduled volunteers' shifts to ensure smooth operations
- Organized CRA tax workshops to equip volunteers with the required knowledge in filing tax returns
- Demonstrated leadership and problem-solving skills through supervising volunteers during tax clinic; adapted to various unexpected scenarios and trouble shoot effectively



# Alex Chen

RG11-273 South Park Rd, Markham | T: 416 688 1682 | E: achen257@uwo.ca

## EDUCATION

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### Ivey Business School & Western University

#### *Master of Financial Economics*

**Expected December 2019**

- **GPA:** 3.7/4.0, Professional Development Program
- **Relevant Courses:** Corporate Finance, Financial Modeling, Value Investing, Securities Law, Financial Economics
- **Projects:** *Value Investing* – “Investment Research and Valuation for Maple Leaf Foods”, conducted Fundamental and Asset Based Valuations, analysis using Excel tools to examine key financial statistics and ratios, assessed business and financial risks, competitive positioning, catalyst and potential merger events; calculated (Bloomberg data 2010) the Intrinsic Value of \$31.20, Entry Price of \$10.40, Price (Aug 2010) 10.37, Current Stock Price (Feb 2019) \$30.31
- **Team Competitions:** McGill International Portfolio Challenge: MIPC

### Department of Management & Department of Economics, University of Toronto

#### *Honours Bachelor of Commerce: Finance Specialist and Economics Major*

**June 2018**

- **GPA:** 3.72/4.0, 3.8 in Economics, Economics Honor Roll, Professional Development Program
- **Relevant Courses:** Corporate Finance (A+), Investments (A), Financial Modelling (A), Financial Accounting (A), Managerial Accounting (A-), Negotiations (A+), Banking & Financial Markets (A)
- **Projects:** *Investments* – Portfolio Management, actively managed 3 funds: long only, long/short, contingency. Used modern portfolio theory (highest risk adjusted return, Sharpe ratio) in combination with a value investing strategy

## EMPLOYMENT AND RELEVANT EXPERIENCE

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### *Associate Consultant, Just Vertical, Toronto*

**January 2018 – April 2018**

- Conducted industry research on home grown produce, health conscious trends, competitors in the market, consumer buying habits and demand for organic pesticide free produce
- Advised on business development strategy to incorporate product (The Aeva) in new “green” condominiums and partnerships with real estate developers
- Developed pricing strategy, promotions and subscription plans that generate passive revenue at low marginal costs

### *Head Teaching Assistant, University of Toronto, Toronto*

**September 2016 – April 2018**

- Taught Introduction to Economics, Intermediate Macroeconomics and Quantitative Economics
- Led a group of 50 second-year students in weekly tutorials through discussion, clarification, and demonstrations, which improved students’ understanding of concepts learned throughout the course
- Organized and created comprehensive lesson plans with regards to textbook and lecture materials that fostered an increase in class participation and attendance by 20%
- Hosted weekly office hours to provide additional support, which helped attending students outperform the class average by 20% or greater

### *Invigilator, University of Toronto, Toronto*

**September 2016 – April 2018**

- Oversaw and ensured all students were adhering to university policies during the writing of examinations
- Resolved issues during the examination in an efficient manner

### *Senior Customer Service Representative, CIBC, Toronto*

**September 2014 – September 2015**

- Received a promotion to Senior Customer Service Representative in four months, two Awards of Excellence and company-wide recognition from CEO Victor Dodig
- Understood client needs, offering appropriate products and knowledgeable advice. Achieved sales 200% over target
- Mentored and assisted new hires in the creation of personal goals in alignment with the company’s vision and reduced overtime hours by 50%
- Resolved customer complaints and offered solutions, increasing customer satisfaction by 80%

## INTEREST AND SKILLS

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**Certifications:** Chartered Financial Analyst – CFA Level 1 Candidate; Bloomberg Market Concepts, Sept ‘18

**Skills/Proficiency:** *Advanced* – MS Excel/VBA, R, SAS, Bloomberg, FactSet, Capital IQ; *Intermediate* – Stata, Matlab; *Languages* – Fluent in English, Cantonese, Intermediate Mandarin

**Music, Instruments, Sports:** Vocalist, Piano, Percussionist (Drums); Basketball, Raptors fan, Softball, Dodgeball

**Travelling:** Los Angeles, Chicago, Alaska, Caribbean Islands, Beijing, Hong Kong, London, Tokyo, Kyoto, Osaka

## KEVIN CHIU

E: kchiu45@uwo.ca | T: 778.990.6460 | London, ON | [LinkedIn](#)

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### QUALIFICATIONS

- Knowledge of Bonds, Equities, Derivatives, Credit Investments Alternative Assets, and Private Equity
  - Strong oral and written communication skills from production of investment research presentations and quarterly reporting.
  - Technical and quantitative skills developed through creation of complex valuation models for fixed-income, FX hedging, equity, real assets and derivatives.
  - Technologically proficient in Microsoft Office Suite (Excel, VBA, Word, PowerPoint), Statistical Programming (R, MATLAB, SAS) and Financial Market Data (Bloomberg, Capital IQ).
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### EDUCATION AND PROFESSIONAL CREDENTIALS

<b>Master of Financial Economics (MFE) Candidate</b>	<b>April 2020</b>
▪ Western University, London ON	
<b>Bachelor of Arts in Economics (Honors)</b>	<b>May 2018</b>
▪ University of Alberta, Edmonton AB	
<b>Level I Candidate in the CAIA Program</b>	<b>February 2019</b>
<b>Level II Candidate in the CFA Program</b>	<b>June 2019</b>
▪ Passed Level I – June 2017	
<b>Passed All Exams of the FRM Program</b>	<b>November 2017 / May 2018</b>
▪ Accruing work experience to receive FRM designation	
<b>VBA for Finance Professionals</b>	<b>October 2018</b>
▪ The Marquee Group, Toronto ON	
<b>Bloomberg Market Concepts Certification</b>	<b>February 2017</b>

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### WORK EXPERIENCE

<b>Co-op Student, Strategic Investment Research</b>	<b>Jan – Apr 2019</b>
British Columbia Investment Management Corporation (BCI) – Investment Strategy and Risk	
<b>Intern, Operational Risk</b>	<b>Apr – Aug 2018</b>
Canadian Western Bank – Integrated Risk Management	
▪ Developed valuation and risk models using financial and quantitative analysis	
▪ Conducted independent asset and sector research for investment decision making	
▪ Built, maintained and automated financial databases for inputs into financial models and reporting	
▪ Creation of statistical risk estimation models utilizing financial reporting and accounting principles	
<b>Undergraduate Teaching Assistant</b>	<b>Sept 2016 – Apr 2018</b>
University of Alberta – Department of Economics	
▪ Ensured the integrity and reputation of Student Code of Ethics during midterm and final exams	
<b>Operational Risk Coordinator – Intern</b>	<b>May – Aug 2017</b>
Canadian Western Bank – Integrated Risk Management	
▪ Management and development of internal memos, presentations, policies and procedures for CWB's senior management, risk and investment committees, board of directors.	
▪ Updated financial models and risk management tools including quantitative risk measurement and scenario analysis	

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### ACTIVITIES AND INTERESTS

- Wall Street Journal / Financial Times
- 2018 McGill International Portfolio Challenge
- Personal Options Trading (Equities and Indices)
- Paramedic Association of Canada – Licensed Emergency Medical Responder

# CLAUDIA CONDOTTA

16 Ashbourne Drive, Toronto, Ontario, M9B 4G9 | (647) 994 – 1466 | ccondot@uwo.ca

## PROFILE

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- Proficient in R and Advanced Excel skills including pivot tables, VLOOKUPS, and VBA
- Strong technical and analytical skills showcased when modelling within financial and economic markets
- An innovative and inspiring leader with an organized, success driven approach to every challenge or task
- Experience conducting investment account analysis to propose improvements in sales using data management tools

## EDUCATION

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- **Western University, London, ON**
  - **Master of Financial Economics Candidate** **Expected December 2019**
  - **Bachelor of Arts, Financial Economics Major** **September 2014 – April 2018**
- **Bloomberg Market Concepts (BMC)** **March 2018**

## EMPLOYMENT EXPERIENCE

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- Stonegate Private Counsel, Wealth Management Intern, Toronto, ON** **Summer 2018**
- Prepared net invested capital graphs by interpreting and adjusting raw data from internal software to communicate overall account growth and deposit/withdrawal activity to high net worth clients.
  - Reconciled portfolio asset mixes/holdings and account transactions into reports for client wealth advisory.
- Toronto Titans Volleyball Club, Beach Volleyball Coach, Toronto, ON** **Summer 2018**
- Helped 30 youth athletes develop technical and mental skills by creating practice plans and offering feedback.
- CIBC President's Choice Financial, Summer Coordinator, Toronto, ON** **Summer 2016 & 2017**
- Independently designed and executed a branch-level evaluation program which contributed to a 2<sup>nd</sup> place ranking in the JD Power Canadian Retail Banking Customer Satisfaction Study.
  - Evaluated financial advisors based on specific criteria and analyzed regional and national data to propose areas of improvement in sales effectiveness based on trend analysis.
- Tory Burch Canada, Sales Support Supervisor, Toronto, ON** **Summer 2016**
- Acted as an international liaison requiring organized communication to ensure sales were executed and reported.

## EXTRACURRICULAR EXPERIENCE

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- Ivey Sports Management Conference, Executive Team Lead Logistics** **September 2018 – January 2019**
- Collaboratively organize the 1<sup>st</sup> annual sports management conference at the Ivey School of Business.
  - Proactively communicate with a team of 7 executive members to ensure cohesiveness and execution.
  - Manage a \$40,000 budget in consideration of 175 attendees including delegates, industry speakers and sponsors.
- Capitalize for Kids Student Challenge, Student Investor** **Winter 2018, Fall 2018 - Winter 2019**
- Analyze stock market trends and read investment/trade news to buy and sell real equities, ETFs, and REITs.
  - Strategically allocate \$1 million in virtual currency to build a stock portfolio on a professional-grade platform.
- McGill International Portfolio Challenge, Student Participant** **September 2018**
- Proposed an asset allocation strategy for an underfunded pension, solving for the deficit given liability constraints.
  - Performed economic research and portfolio analysis to create a strong and sustainable asset mix for the fund.
- Queen's University Sports Industry Conference, Campus Ambassador** **Fall 2017 & 2018**
- Recruited high-quality delegate applications from Western University, acting as a liaison between universities.
  - *PepsiCo Canada* - Case Competition Winner (2017)
- Bank of Canada: The Governor's Challenge, Runner Up** **November 2017**
- Researched, analyzed and forecasted economic developments leading to recommendations on monetary policy.
  - Developed a strong understanding of the Canadian economy; acquired analytical, teamwork, & presentation skills.

# Peter James Cordeiro

226-700-4674 | 444 Lawson Road, London, ON | pcordeir@uwo.ca

## SUMMARY OF QUALIFICATIONS

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- Familiar with financial modelling, cash flow analysis, and financial valuation
- Strong ability to communicate complex and technical concepts to laypeople
- Ability to collaborate with a wide-range of professionals to come up with innovative solutions
- Proficient in Econometric and Data Analysis in R and SAS; Experienced in Microsoft Office Suite

## EDUCATION

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### Western University

*Master of Financial Economics*

**London, ON Canada**

September 2018 – December 2019

### McMaster University

*Honours Bachelor of Arts in Economics (Specialist)*

*Minor in Finance and Business Certificate*

**Hamilton, ON Canada**

September 2013 – April 2018

- Major GPA 3.7/4.0; Deans' Honour List and University Senate Scholarship Recipient
- Relevant Coursework: Econometrics, Financial Valuation, Corporate Finance

## WORK & LEADERSHIP EXPERIENCE

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### McMaster University Value Investing Pitch Presentations

*Head of Research - Operations Strategy*

**Hamilton, ON Canada**

January 2018 – April 2018

- Created a relative valuation of a \$50B technology company to make investment recommendations regarding market undervaluation in terms of comparable metrics
- Worked alongside undergraduate and MBA members to analyze a small Canadian multinational communications company; selected to be part of an investment pitch presentation in Toronto

### Economics Seminar Course

*Asset Pricing Researcher*

**Hamilton, ON Canada**

January 2018 – April 2018

- Collected large datasets using research platforms such as WRDS and CRSP
- Compared CAPM and Fama-French factor models to various large stock portfolios
- Analyzed stock returns of Canadian versus American firms using time series regression

### Ontario Quizbowl Association

*Board Member / Interim President*

**Toronto, ON Canada**

November 2015 – Present

- Involved in quiz-based competitions that test players on a wide variety of academic subjects
- Wrote summaries for various academic and trivia events throughout Ontario and abroad
- Worked with executive board to strengthen outreach of Quizbowl in Ontario
- Organized and coordinated eight academic events that were attended by over 250 schools

### Various Employers

*Mathematics Tutor*

**Hamilton, ON Canada**

July 2014 – Present

- Built up network of students through local connections and online networking
- Taught students various concepts with tailored methods of approach
- Used real life situations to engage students to solve problems critically

## INTERESTS

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Early Canadian historical monuments, International Cuisines, Grasping new and interesting mathematical and scientific concepts



# Zachary Hall

London, ON | 403-554-5805 | zhall3@uwo.ca

## PROFILE

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- Outgoing individual passionate about the international scope of the financial industry and the need to think critically
- Strong communication, presentation and problem solving skills illustrated through case competition experience
- Proficiency in Microsoft Office and R to be used for data analysis and decision making
- French and Spanish Working Proficiency

## EDUCATION

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- Western University** Sept. 2018 - Apr. 2020 Expected  
Master of Financial Economics Candidate (London, ON)
- Interdisciplinary education across Ivey School of Business, Faculty of Law, Actuarial Science and Economics
  - CFA Exam Level I Candidate June 2019
- Carleton University, Sprott School of Business** Sept. 2014 - May 2018  
Bachelor of International Business; Global Finance Management and Systems, Minor in Spanish (Ottawa, ON)
- CGPA 11.21/12; Honours with High Distinction
  - University Medal recipient for the Bachelor of International Business
- Universidad de Chile, Facultad de Economía Y Negocios** Feb. 2017 - Nov. 2017  
(Santiago, Chile)
- Two semesters of business and economics courses with Spanish and English instruction

## EXPERIENCE

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- Export Development Canada, Model Risk Management Intern** Jan. - Apr. 2019  
(Ottawa, ON)
- Model testing and quality assurance activities under the guidance of a senior team member
  - Assist in development of verification and validation benchmark models
- Canyon Meadows Golf and Country Club, Member Services Supervisor** May - Aug. 2015, 2016, 2018  
(Calgary, AB)
- Promoted to shift supervisor as a result of work habits and client relations
  - Managed crew of 3-5 employees; accountable for department's performance
- DAVIDsTEA, Sales Associate** June 2014 - Aug. 2015  
(Calgary, AB)
- Recognized for having strongest sales performance amongst employees
  - Mentored and trained new employees on Point of Sales system, products, and sales techniques

## PROJECTS

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- McGill International Portfolio Challenge, Western University** Sept. 2018
- Modelled a liability schedule and developed a portfolio strategy to solve an underfunded pension
- Entrepreneurship Team Member, Jeux du Commerce Central, Carleton University** Sept. 2016 - Jan. 2017
- Responsible for case finances, business modeling, and business valuation
  - Developed and delivered a 20-minute Venture Capital pitch to a panel of industry professionals
- Merchandise Coordinator, Sprott Business Student Society, Carleton University** Sept. 2015 - Apr. 2017
- Designed, marketed, and sold school merchandise for the Sprott School of Business; budget of \$10,000
- Vice-President of Charity, Jeux du Commerce Central, Carleton University** Sept. 2014 - Jan. 2015
- Coordinated street-side donations raising \$1500 for Big Brothers & Big Sisters Ottawa
  - Organized with Junior Achievement Canada an introduction to financial literacy to youth students across Ottawa
- Junior Representative, Net Asset Task Force, CISV Canada** Nov. 2014 - Nov. 2015
- Advised in the financial decision making regarding approximately \$100,000 for the non-profit organization
  - Modelled solvency and expected cash flows to create and implement a rotational subsidy schedule

## BRYAN JAMES HEIDINGER

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LinkedIn: www.linkedin.com/in/bheiding/

## EDUCATION

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### Western University/Ivey Business School

London, Canada

#### Master of Financial Economics Candidate

August 2018 – Dec 2019

- Interdisciplinary program between Ivey Business School, Western Economics, Statistics & Actuarial Sciences, & Law
- **Current Cumulative GPA: 3.7/4.0**
- **Case Competitions:** Currently participating in National Investment Banking Competition, McGill International Portfolio Challenge, T.D. Risk Management Case Competition

### University of Victoria

British Columbia, Canada

September 2013 – April 2018

- **Major:** B.A. Economics (*Honours*), concentration in Finance; **minor:** Business
- **Graduating GPA: 4.0 /4.0**, graduated with distinction, (top 10%)
- **1/12 students** to achieve admittance to the Economics Honours program. As part of the program completed an empirical academic paper. This paper disproves foreign exchange rate forecasting models that were viewed as favorable in the past, viewable via this [link](#)

## WORK EXPERIENCE

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### Hines & Associates (Investment Banking)

London, United Kingdom

Incoming Summer Analyst

April – September 2018

- Hired to be a part of the team involved in M&A and raising capital for fintech and insurtech companies

### Infinity Group (Private Equity & Venture Capital)

Beijing, China

Summer Analyst

June – September 2018

- Co-led capital raise for a new VC fund via an equity offering of a security token (STO)  
*A process that is similar to an IPO and a private raise, except the shares are held on the Ethereum blockchain*
- Orchestrated deep dive research projects into topics regarding blockchain, and the feasibility of a security token financed venture capital fund.
- Connected with possible business partners and experts in the field of blockchain to explore the market demand for such a fund, presented findings to Infinity founder
- Compiled pitch books for venture capital fund offerings to Investors, Banks and possible anchor partner firms
- Aided in management of Infinity's incubation of start-up Y-China, a growing media platform that aims to bring Chinese and Western cultures closer together. Shadowed founder of Y-China and assisted with content generation
- Attended 3-day investor event in China's economic zone Zhuhai. Learned valuable networking skills, correct and incorrect roadshow presentation methods and gained insight into the current technology start-up sphere

### Clarkson's Shipbroking

Singapore

Summer Intern

June – August 2014

- Updated tonnage and cargo lists in order to identify possible matches for use in client negotiations
- Gained familiarity with the business cycle of the shipping industry, including supply, demand & market movement

## LEADERSHIP & VOLUNTEER EXPERIENCE

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### Western Capital Markets

- Took part in educational sessions regarding valuation methodologies and corporate finance models

### Western Investment Club

- Collaborated in making investment decisions regarding allocation of a \$194,000 AUM portfolio

### Delta Kappa Epsilon (International Fraternity)

- Launched charity events such as Salvation Army donation collections, bottle drives and sponsored marathons

## SKILLS & INTERESTS

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**Work Permits:** Canadian, UK Right to Remain, Hong Kong Permanent Resident (can work in all three without visa sponsorship)

**Languages:** English (native), Mandarin (intermediate)

**Corporate Finance Skills:** Experience with DCF's, LBO's, M&A, Trading/Transaction Comps, and Pitch deck generation

**Technical Skills:** Proficient in statistical software (SAS, R), Bloomberg Market Concepts, Advanced Excel & PowerPoint

**Interests:** Travel, skiing, snowboarding, drums, bass guitar, music production, fitness, golf, surfing

# Anthony Cole Hinzmann

London, ON | 306-536-4673 | [ahinzman@uwo.ca](mailto:ahinzman@uwo.ca) | LinkedIn: [www.linkedin.com/in/Hinzmann](http://www.linkedin.com/in/Hinzmann)

## SKILLS & QUALIFICATIONS

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- Strong analytical skills developed through courses in economics, financial modelling and financial econometrics
- Proficiency in R and Advanced Excel; experience with MATLAB, Bloomberg and Capital IQ
- Working knowledge of VBA obtained through The Marquee Group's VBA for Finance Professionals course
- Exceptional communication skills gained through group projects and student leadership experience
- Excellent research ability developed through academic and professional research projects

## EDUCATION

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**Western University & Ivey Business School** | London, ON Expected December 2019

Master of Financial Economics Candidate

- GPA: 87.5/100
- Brisson-Toal Master of Financial Economics - Quantitative Finance Award (January 2019)

**CFA Level I Candidate** June 2019

**University of Regina** | Regina, SK May 2018

Bachelor of Science Honours, with Honours in Economics

- GPA (last two years): 87/100
- Awards: Dr. Alex Kelly Undergraduate Economics Essay Prize (2018), Economics Honours Award (Winter 2018), Honours Entrance Award (2017), Academic Silver Scholarship (2017)

## EXPERIENCE

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**Canadian Federation of Independent Business** | Regina, SK February – April 2018

Administrative Assistant

- Managed the office's communications and provided excellent customer service to members by being the first on the phones to identify their needs and direct them to the appropriate support
- Provided administrative assistance to the office by updating Excel spreadsheets and reviewing research documents, which helped ensure the effective running of the office

**University of Regina, Department of Economics** | Regina, SK January 2017 – April 2018

Teaching Assistant

- Accurately graded and returned students' assignments in a timely manner
- Explained economic concepts to students with little economics training during tutorial center hours which helped improve students' grades

**Canadian Federation of Independent Business/Scotiabank** | Regina, SK May – August 2017

Public Policy and Entrepreneurship Intern

- Led completion of a major research project on small business property taxation which was read by municipal leaders and influenced taxation policy in municipalities across Saskatchewan
- Designed a survey question to gauge entrepreneurs' views on the elimination of the provincial sales tax commission in the 2017 Saskatchewan budget; the results were used by the organization to lobby government
- Participated in lobbying meetings with municipal and provincial government officials

## EXTRACURRICULAR

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- Team Saskatchewan water polo player 2010 – 2018
- TD Market Risk & Model Development Case Competition September 2018
- President of the University of Regina Economics Students' Association 2017 – 2018
- University of Regina Undergraduate Student Representative for Economics 2017 – 2018
- Vice President of the University of Regina Economics Students' Association 2016 – 2017
- Avid reader of Bloomberg and The Wall Street Journal

# SANG KIM

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## QUALIFICATIONS

- Excellent quantitative and data analysis skills: financial modeling, time series forecasting/simulations
- Strong computer skills: Advanced Excel, Access, VBA, Visio, Python, R, SAS, MySQL, Bloomberg, S&P Capital IQ
- Knowledge of derivatives pricing models, market risk measures, and operational risk management
- Basic understanding of Basel III, FRTB, market data requirements, P&L attribution and risk sensitivities

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## EDUCATION

**University of Western Ontario** **London, Canada**  
*Master of Financial Economics (MFE)* *December 2019*  
Courses: Microeconomic Theory, Financial Econometrics, Financial Modeling, Financial Options

**University of Ottawa, Telfer School of Management** **Ottawa, Canada**  
*Bachelor of Commerce (Finance option), GPA: 8.29/10* *April 2018*  
Academic Projects: Analysis of the ECB liquidity provision and its impact to the European sovereign CDS, Valuation of a Canadian Real Estate Investment Trust (REIT), LBO modeling in the Canadian telecommunication industry

**Canadian Securities Institute (CSI)** **Toronto, Canada**  
*Canadian Securities Course (CSC) certificate* *2014*

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## WORK EXPERIENCE

**Republic of Korea Army (Compulsory Military Service)** **Seoul, Republic of Korea**  
*Sergeant* *May 2015 - Feb 2017*

- Developed leadership skills by leading a team of 20 through multiple training exercises and military operations.
- Maintained defense logistics management system to support information exchange and supply chain management.
- Saved 5% of total logistics support cost by implementing a new resource allocation strategy.

**Orbis Risk Consulting Inc.** **Ottawa, Canada**  
*Junior Management Consultant (Security Clearance: Reliability)* *January 2015 - May 2015*

- Analyzed the funding models and project risks for public infrastructure projects over \$1.5MM CAD in the departmental infrastructure investment program.
- Created project status reports for biweekly client meetings to discuss project milestones and potential risks.
- Developed and implemented a new costing model and sensitivity analysis framework to improve the due diligence process of the client-funding program, which is over \$1B CAD per year.

**Orbis Risk Consulting Inc.** **Ottawa, Canada**  
*Junior Management Consultant (Security Clearance: Reliability)* *April 2014 - August 2014*

- Analyzed business processes of the federal government agencies and assessed the underlying operational risks.
- Contributed to the review of the Internal Controls over Financial Reporting (ICFR) framework and policy directives of the Canadian government in accordance with the Committee of Sponsoring Organization (COSO).
- Organized business meetings and client workshops.

**Shared Services Canada (SSC)** **Ottawa, Canada**  
*Project Coordinator (Security Clearance: Reliability)* *September 2013 - December 2013*

- Assisted the IT transformation branch on reviewing the procurement strategies of the federal government departments.
- Conducted a cost-benefit and trend analysis using the federal government IT infrastructure data.
- Liaised with the transformation project partners and stakeholders to improve IT service delivery.

**National Arts Centre** **Ottawa, Canada**  
*Financial Analyst* *January 2013 - April 2013*

- Analyzed monthly sales and account receivable for different business units at the National Arts Centre.
- Coordinated with IT project managers for developing and testing a new financial accounting system.

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## EXTRACURRICULAR ACTIVITIES

- Competitions: PRIMIA Risk Management Challenge, Telfer Equity Valuation Case (ranked in the Top 10)
- Member of the Global Association of Risk Professionals (GARP), and the Institute of Internal Auditors (IIA)
- Reading: Financial regulations, international relations (e.g. Foreign Affairs)



# Kyle Kokot

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(289) 929-8398      kkokot@uwo.ca

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## Summary of Qualifications

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- Previous work experience with both debt and equity financing, and in analyzing companies across various industries
- Proficient in R, SAS, Bloomberg, MS PowerPoint & Advanced Excel, including VBAs and Macros
- Excellent teamwork, communication and leadership skills, developed through years of team sports & sales experience
- Decisive, organized and detail oriented, with strong interpersonal and problem solving skills
- Keen interest in finance demonstrated by education, pursuit of industry certifications and additional activities

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## Education

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### Western University

London, ON

Master of Financial Economics (MFE) Candidate – December 2019

- *The Ivey Business School, Faculty of Law, Departments of Economics and Statistical and Actuarial Sciences*
- Courses: Financial Modelling, Cash Flow Analysis & Investments, Raising Capital, and Corporate Finance

### Brock University

St. Catharines, ON

Honours BA in Economics, with a Minor in History – Graduated 2017

- Courses: Money and Banking, Monetary Economics, International Payments, and Economic Analysis. Final year: 84%

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## Competitions, Projects, and Professional Courses

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### National Investment Banking Competition (NIBC)

January 2019

- My team and I will be submitting a client-ready valuation and strategic review of a select company

### Cash Flow Analysis & Investments Final Project

November 2018

- Working in teams of 3, we restated and adjusted the balance sheet and income statement, to reflect the true operating parameters and sustainable cash flows for Magna International, by analyzing their 2017 Annual Report

### Financial Econometrics Final Project

November 2018

- Working in teams of 3, we researched and gathered stock return data from Bloomberg to run regressions using R, to test how different industries perform in bull, bear and neutral market states, in addition to forecasting future market conditions

### Raising Capital Final Project

April 2019

- Will analyze Tesla's Financial Statements to create a Financial Model, and then make recommendations for capital raising

### CFA Level 1 Candidate – CFA Institute

June 2019

### Canadian Securities Course (CSC) – Canadian Securities Institute

January 2018

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## Work Experience

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### Toshiba of Canada Ltd. – Sales Administration and Business Planning Assistant (2014, 2015 & 2017)

- Exposed to both debt and equity financing, and capital leasing. Also learned to analyze businesses in various industries when tasked with the creation of a Toshiba NAICS codes system for their customers using Excel

### OMHA, OWHA & Brock University – Ice Hockey Referee (2010 – 2017)

- Balanced the demanding school and work requirements, while attending Brock University, which helped to develop excellent time management skills. Also learned to keep composure in a fast-paced work environment

### TruGreen – Lawncare Service Technician (2018)

- Solicited new customers by discussing company services and closing deals, while maintaining punctuality on my route

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## Sports, Interests & Extracurricular Activities

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- Brampton Excelsior Intermediate A Lacrosse team Alumni
- Past member of the Ontario Varsity Football League (OVFL) Junior Varsity provincial championship team
- International Silver Stick Invitational Hockey Tournament, Midget Division, championship team alumni
- Interests include hockey, football, golf, weightlifting, history and politics
- Keep up to date with the markets by reading publications, such as BNN Bloomberg, CNBC and the Financial Post
- Attended the Marquee Group VBA & Macros Seminar, and registered in Wall Street Prep Program & Accounting Course
- Drove across Canada during the summer of 2018

# Hao Tian (Davie) Li

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## QUALIFICATIONS

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- Understanding of financial instruments, corporate finance and extensive experience with technical analysis
- Proficient with Python, R, Stata, Excel (VBA), Bloomberg, and PowerPoint
- Exceptional communication skills in both English and Mandarin
- Strong teamwork abilities, interpersonal and leadership skills developed through school and work

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## EDUCATION

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### UNIVERSITY OF WESTERN ONTARIO

*Master of Financial Economics Candidate*

Grade Percentage: 82.5%

London, Ontario

December 2019

### UNIVERSITY OF TORONTO

*Honours Bachelor of Science in Statistics and Economics*

GPA: 3.32/4.00

Toronto, Ontario

August 2018

### CFA Level 2 Candidate

June 2019

### Bloomberg Market Concept

September 2018

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## EXPERIENCE

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### EXCITE CLUB

*Data Analyst Intern*

Toronto, Ontario

May 2018 – August 2018

- Performed data analysis and refinement on large data sets utilizing R
- Developed model lifestyles and personas based on cellphone data
- Worked with other data analysts in a team setting and implemented a machine learning algorithm based on neural network in Python that increased the predictive accuracy by 4% from the existing algorithm
- Presented new findings and updates to operations director and the data analysis team during weekly meetings

### CRYPTOCURRENCY RESEARCHING AND TRADING

*Researcher and Trader*

Toronto, Ontario

June 2017 – Present

- Researched Bitcoins blockchain technology and its market trends
- Traded Bitcoins and Ethereum on Poloniex Exchange
- Traded Bitcoins derivatives on Bitmex
- Familiarized with trading functions and operations on online exchanges

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## EXTRACURRICULAR ACTIVITIES

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### WESTERN UNIVERSITY

*Teaching Assistant and Exam Proctor*

September 2018 – Present

- Prepared and led statistical labs aimed to enhance students' understanding of the course materials
- Supervised and marked students' assignments and exams
- Answered students' questions and concerns regarding class materials and labs in a timely manner

### METRO VANCOUVER UNION (VANU)

*President*

September 2016 – May 2017

- Oversaw operations and management of the organization
- Acted as spokesperson to University of Toronto Student Union
- Supervised staffing, meetings and financial operations
- Promoted the expansion of VANU through clubs fair and social media

# BRANDON LOSHUSAN

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[www.linkedin.com/in/brandonloshusan](http://www.linkedin.com/in/brandonloshusan)

## EDUCATION

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**Master of Financial Economics Candidate – 4.0 GPA** Expected December 2019  
The University of Western Ontario & Ivey Business School, London, ON

- CFA Awareness Student Scholarship Recipient
- MFE Program Entrance Scholarship Recipient

**CFA Level I Candidate** June 2019

**Bachelor of Science, Honours Economics – 4.0 GPA** April 2017  
University of Windsor, Windsor, ON

- Board of Governor's Award – graduate with the highest GPA in their program
- Scored in 93<sup>rd</sup> percentile on the MCAT

**Bachelor of Science, Major in Chemistry – 3.5 GPA** April 2014  
The University of Western Ontario, London, ON

- Published in the Journal of Minerals Engineering
- Varsity Swim Team Captain

## WORK EXPERIENCE

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**Tecumseh Investments Limited, Kingston, Jamaica** August 2016 - August 2018  
Operations Manager

- Restructured the corporation by outsourcing accounting and legal obligations which resulted in a reduction of company expenses by 60% per annum
- Worked closely with financial advisors to reinvest \$600,000 USD into a new group of holdings to achieve a more balanced portfolio of assets
- Coordinated with certified accountant to submit corporate records and filing obligations to the government in a timely manner
- Attended all annual shareholder meetings of private subsidiaries and relayed new business developments to the corporation's Director

**The University of Windsor, Department of Economics, Windsor, ON** May 2015 - May 2018  
Research Assistant & Teaching Assistant

- Increased students GPA by 10% via online economic tutorials and peer assisted learning sessions
- Provided reports to supervisors on efficacy of course changes to student GPA using Excel/Stata
- Examined data from previous year exams to identify students' weaknesses; enabled the creation of 36 video tutorials to address those weaknesses for future course iterations
- Created a 50-page course-specific user manual for MATLAB that is currently being used

## ACHIEVEMENTS & ACTIVITIES

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- National Investment Banking Competition & Conference January 2019
- Ivey Investment Club Member
- Avid reader of The Wall Street Journal & The Globe and Mail
- Dedicated Marathon Runner
- Olympic Trials Qualifier – Competitive Swimming
- Experienced in R, Stata, SAS, MATLAB, Excel, Word, PowerPoint, Bloomberg, and Capital IQ

# MICHAEL A. MOORE

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Address: 114 Wharncliffe Road North, London, ON Canada

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## EDUCATION

**Master of Financial Economics Candidate**, University of Western Ontario, London, ON Expected Dec 2019

**Bachelor of Arts (Honours), Applied Economics Major**, Queen's University, Kingston, ON Sept 2014 – June 2018

- Academic All-Canadian
- Dean's List Recipient

**Phillips Academy Andover**, Andover, MA, USA Sept 2013 – June 2014

- Academic and Athletic scholarship

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## SKILLS

- CFA Level I Candidate Expected June 2019
- Bloomberg Market Concepts Certification
- Excellent leadership and teamwork experience
- Exceptional analytical skills
- Strong competency in using R, Stata and Python
- Proficient in MS Word Suite
- Persuasive oral communication ability
- Effective sales and marketing skills

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## PROFESSIONAL EXPERIENCE

**Hamilton Tiger-Cats Football, Canadian Football League** May 2018 – June 2018

- Drafted 44<sup>th</sup> overall in the 2018 Canadian Football League draft to the Hamilton Tiger-Cats
- Attended training camp for the Tiger-Cats and placed on the non-active roster in order to pursue MA degree

**Property Management Summer Internship**, Homestead Land Holdings Limited, Kingston, ON May 2017 – Sept 2017

- Student internship designed to effectively learn the business of property management
- Managed a \$100,000 Capital Expenditure budget. This included seeking contractors, receiving quotes, choosing the contractor based on performance & price, and overseeing the project ensuring it was done on time/budget
- Worked with property managers in learning how they sell property and how they maintain ongoing business

**Inside Sales Representative**, Upper Canada Forest Products, Mississauga, ON Summers 2014/2015/2016

- Took sales calls from both existing and potential customers and provided them with product suggestions
- Cold called prospective customers and informed them of the company's products
- Quoted customers competitive prices while maintaining maximum profits
- Handled and resolved customer complaints in order to ensure on-going business
- Utilized advanced sales techniques when closing deals and upselling

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## EXTRACURRICULAR EXPERIENCE

**Queen's and Western Varsity Football Teams**, Queen's University, Kingston, ON Sept 2014 – December 2018

- Awarded a 4-year Athletic Scholarship as a result of exemplary performance athletically and academically
- Named Team Captain in Sophomore year as a result of model dedication and performance
- Dedicated 30+ hours a week to practices, meetings, and games on the road while balancing a full course load

**National Investment Banking Competition & Conference**, Western University, London, ON Fall 2018

- Competition for undergraduate and graduate students across Canada to solve real world investment banking problems
- Competitors will utilize skills such as researching and analyzing financial data, running scenarios in financial models, evaluating structural alternatives against client parameters, creating pitch books and presenting to senior management



# Tushar Suple

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174 Woodmount Avenue, Toronto ON

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## Highlights of Qualifications

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- Highly-accurate, detail-oriented professional with a strong passion for financial markets and portfolio management
- Advanced MS Excel (VBA and Macros) developed through building financial models for valuations
- Strong proficiency in R developed from building econometric models and outputting data in MATLAB
- Advanced skills in MS PowerPoint applied in professional presentations
- Strong data extraction/mining utilized in Bloomberg Terminal, SQL database management

## Education

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### Master of Financial Economics Candidate

September 2018 – Present

University of Western Ontario, London, Ontario

Courses: Portfolio Management, Corporate Finance, Financial Econometrics, Financial Modelling, Options Pricing

### Bachelor of Business Administration in Finance with Honours

January 2013 – June 2017

Laurentian University, Dean's List

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## Career Summary

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### Operations Analyst, TD, Toronto

April 2018 – August 2018

- Improved day to day functions by automating tasks developing macros in VBA resulting in a 20% increase in efficiency
- Provided support in operational due diligence and oversight of investment managers by partaking in meetings and calls
- Modeled data in VBA and created reports from resulting statistics on deals adjudicated for senior management
- Managed databases in MySQL, MS Access and Excel often aggregating data between the different programming suites
- Worked with risk management on developing proprietary algorithms and coding trade processes and analytical tools

### Business Analyst, WR Systems, Toronto

May 2017 – March 2018

- Provided business analysis services for banking client Santander Bank including complex financial analysis
- Assisted in development of client reports, presentations and managed multiple responsibilities simultaneously
- Conducted market research, competitive research working cross functionally with analysts in technology division

### Financial Analyst Intern, LIG, Sudbury

September 2016 – April 2017

- Conducted analysis of equity and commodity market which developed understanding of financial markets
  - Determined and applied risk and performance analytics to investment portfolio in a collaborative team environment
  - Assisted portfolio managers in the development and monitoring of portfolios and alpha-generating trading strategies
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## Projects

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### TD Market Risk & Model Development Case Competition

2018

Competitive risk management competition requiring insights on Market, Counterparty, and Liquidity risk

### Investment Mining Management Competition, Goodman Gold Challenge

2017

Analyzed financial performance of junior gold mining companies by completing valuations, pitched to industry mavericks

### Global Young Leaders Conference, New York/Washington DC

Nominated as Canadian delegate to Global Young Leaders Conference (GYLC) a mock United Nations Conference

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## Certificates

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### VBA for Finance Professionals, The Marquee Group, Toronto ON

October 2018

### Bloomberg Market Concepts Certificate (BMC)

September 2018

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## Extracurricular Experience

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• Tennis

• Golf

• Culinary Arts

## Tina (Xiaodan) Tang

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778-922-2006

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### PROFILE

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- Enthusiastic and dedicated master student with excellent analytical abilities and solid quantitative skills developed through case studies and academic projects.
- Keen interest in quantitative finance; planning to pursue a career in risk management and asset management with a deeper understanding of financial techniques and economic theories.
- Cooperative, responsible, and congenial personality enabled me to work and communicate effectively with people from different cultural backgrounds by using bilingual skills in English and Mandarin

### EDUCATION

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**Master of Financial Economics Candidate** May 2018-December 2019

Department of Economics, Western University (London, Ontario)

- Continuously learning programming skills, including R, SAS, VBA and Excel.

**Bachelor of Commerce with Distinction (Co-op)** September 2013-April 2018

Gustavson School of Business, University of Victoria (Victoria, BC) - Cumulative GPA: 7.58/9

- Dean's List Certificate
- Scholarships: UVic Entrance Scholarship, BCom Entrance Scholarship, President's Scholarship

### WORK EXPERIENCE

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**Customer Services Representative, Scotiabank** January 2017-March 2018

- Delivered trusted advice using solid product knowledge to help clients better manage their wealth.
- Minimized errors through close attention to detail when processing banking transactions, including servicing client accounts, accepting loan and mortgage payments, and correcting discrepancies.
- Provided a welcoming environment by offering a friendly greeting on arrival and increased customers' satisfaction by carefully listening and assessing customers' needs.

**Sales Associate, Bath and Body Works** August 2016-November 2016

- Provided exceptional customer service by using superb communication and interpersonal skills to meet client needs, such as introducing products and explaining promotions.
- Utilized excellent organizational skills by working efficiently with multiple tasks in a fast-paced retail environment serving an average of 15 clients per hour during a typical busy day.

**Account Service Representative, Royal Bank of Canada** June 2016-September 2016

- Accurately and timely organized account deliveries received from corporate clients, night deposits, and ATM machines.
- Efficiently managed multiple tasks by prioritizing those most urgent across a number of assignments (more than 25 parcels per hour) and contributed high efficiency to the team.

### VOLUNTEER EXPERIENCE

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**Tax Preparer and Pre-Screener, Community Volunteer Income Tax Program** March 2018-April 2018

- Demonstrated solid problem-solving skills by interpreting tax knowledge, tax policy and UFile software.

**Account/Sales Representative, AIESEC** January 2015-May 2015

- Developed strong business communication skills by contacting corporate human resources departments to identify international internship opportunities for international students.

### ACADEMIC PROJECTS

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- RBC case competition: Coordinated team player used superior analytical and communication skills by presenting financial solutions to a group of professionals and successfully entering the semi-final.
- Global portfolio simulation: Articulated investment strategies in trading stocks, bonds, options and futures in global trading markets, such as option straddles, covered call and protective put.
- Econometric project: Evaluated the predictive power of various models in forecasting exchange rates volatility using statistical tests for 2608 observations for each exchange rate through R programming software.

# IBISO TARIAH

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## SUMMARY OF QUALIFICATIONS

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- Well-developed quantitative and analytical skills, experienced in R, SAS, Stata and Bloomberg
- Excellent communication skills developed through 3+ years of client service experience
- Strong desire to learn and gain a deeper understanding of financial markets
- Detail oriented individual who thrives in a collaborative team environment

## EDUCATION

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**Master of Financial Economics Candidate** **September 2018 - December 2019**  
*Western University* *London, ON*

- **Courses:** Portfolio Management, Macroeconomics, Financial Modelling, Corporate Finance

**Bachelor of Arts in Economics (Honours)** **September 2012 - April 2016**  
*McMaster University* *Hamilton, ON*

**Certificates:** Bloomberg Market Concepts, Canadian Securities Course, and Leadership and Management

## PROFESSIONAL EXPERIENCE

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**Technical Support Analyst** **August 2016 - August 2017**  
*Dependable IT Group Inc.* *Hamilton, ON*

- Attended to an average of 250 clients weekly and maintained a Calls Resolved rating of 90%
- Resolved customer concerns by employing effective listening skills to accurately diagnose and solve problems, resulting in a 25% increase in team's efficiency
- Assisted in the initiation of a call-back system which improved customer satisfaction and feedback

**Office Administrator** **February 2014 - April 2016**  
*Administration Office, McMaster University Student Centre* *Hamilton, ON*

- Managed the bookings of conference rooms and coordinated with departments to organize campus events
- Organized and implemented an efficient e-filing system thereby speeding up the data retrieval process

## EXTRACURRICULAR ACTIVITIES

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**CFA Institute Equity Research Challenge** **September 2018 - Present**  
*Western University* *London, ON*

- Gaining practical experience in equity research and analysis by collaborating with a team of 5 to research and value a publicly traded corporation, produce research report and issue investment recommendation

**Investment and Portfolio Management Competition** **January 2019 - Present**  
*Capitalize for Kids* *Toronto, ON*

- Currently competing in an investment and fundraising challenge for kids' mental health using \$1 million in virtual currency to build the ultimate portfolio

**Accounting Associate** **January 2017 - August 2018**  
*Finance Department, Restoration House Hamilton* *Hamilton, ON*

- Increased group productivity by 30% through the effective training of 3 new volunteers over a 6-month period
- Reduced errors by investigating discrepancies in financial records and reconciling bank statements
- Received a Certificate of Recognition for outstanding work as a Tax volunteer in the Income Tax Program

**Human Resources Executive** **September 2015 - April 2016**  
*Afrofest Committee, MacAfricans, McMaster University* *Hamilton, ON*

- Collaborated with a team of 12 to organize a cultural fundraising event for 800+ people that raised over \$7000
- Recruited, trained and managed a team of 15 volunteers resulting in the successful management of the event

## MEMBERSHIPS & INTERESTS

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- **Groups:** Women in Capital Markets, Canadian Association of Urban Financial Professionals
- **Interests:** Enjoy cooking, travelling and the science of forensics and criminology

## Qualifications

### Financial Skills

- Practical experience in derivative pricing models, equity valuation models, portfolio optimization and risk management
- Solid knowledge in financial reporting and budget models; proven ability to understand and analyze financial statements

### Quantitative Skills

- Proficient in various programming skills: R, MATLAB, Excel, VBA and Python
- Comprehensive Mathematics knowledge extended to probability, statistical modelling, financial econometrics and computational methods in finance

## Education & Certifications

### University of Western Ontario, London, Canada

**09/2018 – 12/2019** (Expected)

- Master of Financial Economics
  - Collaborative program of Western Economics, Ivey, Statistics & Law

### University of Waterloo, Waterloo, Canada

**09/2013 – 04/2018**

- Bachelor of Mathematics
- Major: Honours Mathematics/Financial Analysis and Risk Management
  - Chartered Financial Analyst Specialization, Co-operative Program
- Minor: Statistics

### Academic Performance:

- Cumulative Average: 80.24%
- Major Average: 85%
- Graduation with Distinction

### Award:

- President's Scholarship of Distinction (Graduation with average over 95% from high school)

### Certifications:

- Passed CFA Level II **08/2018**
- FRM Level I Candidate **09/2018**

## Work Experience

### Financial Analyst, CBRE Ltd, Toronto, Canada

**05 – 08/2017**

- Coordinated with senior property managers to prepare the annual budgets and forecasts for revenue and expenses
- Conducted budget variance analysis in consecutive budget years by comparing budgets with actual figures
- Analyzed expense report to update accrued tax and insurance expenses for each property; created Excel worksheet to automate the calculations for monthly expenses

### Analyst, Client Measurement, Scotiabank, Toronto, Canada

**09 – 12/2016**

- Assisted in the design of customized reports to track profitability by client, product, industry and region
- Produced and analyzed profitability and performance reports from database using Business Intelligence Tool (Tableau)
- Created and updated VBA macros to automate reports generation process

### Financial Analyst, KIK Custom Products, Toronto, Canada

**05 – 08/2016**

- Maintained and updated profit and loss reports, asset depreciation analysis and capital expenditure schedule; assisted in preparing consolidated quarter end MD&A and financial statements
- Performed monthly intercompany reconciliation by consolidating various General Ledgers to analyze and eliminate inter-company cash flows and mismatches
- Analyzed expense data and created monthly restructuring cost reports

## Extracurricular Experience

### Competitions:

- CFA Institute Research Challenge
- ETF Global Global Portfolio Challenge

### Organizer, Art Club, Imperial College of Toronto, Toronto, Canada

**01 – 06/2013**

- Arranged venue and contacted sponsors for financial support for Art Exhibition
- Received professional training in Fine Arts over 10 years in China

# XUANZHEN (REGINA) ZANG

xzang4@uwo.ca | 613-483-9450 | 58 Brentwood Crescent, London, ON N6G 1X2

## QUALIFICATIONS

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- Proficient analytical and quantitative skills; Advanced in R, Stata, Matlab, VBA, MS Excel, and EViews
- Solid knowledge of finance including pricing and valuation model, cash flow analysis, and portfolio management
- Strong time management, communication and presentation skills demonstrated through professional experience
- Excellent organizing, problem solving and team working abilities improved through extracurricular experience
- Solid leadership experience including a business competition and various undergraduate student events

## EDUCATION

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- Master of Financial Economics Candidate**, Department of Economics, Western University, London, ON, Canada **Present**
- Relevant courses: Options Pricing, Financial Modelling, Portfolio Management, Corporate Finance
  - GPA: 89.5/100, Awards: MFE Program Entrance Scholarship
- Master of Science in Management**, Smith School of Business, Queen's University, Kingston, ON, Canada **2017-2018**
- Specialization: Business Economics, Relevant courses: Applied Statistics, Econometric Methods
  - GPA: 3.54/4.3, Awards: Entrance Scholarship
- Bachelor of Economics**, School of Economics, Liaoning University, Shenyang, Liaoning, China **2013-2017**
- GPA: 86/100, Awards: Academic Scholarship, Outstanding Student Cadre of Liaoning University (2015, 2016)
- CFA Level II Candidate** **2018**
- Bloomberg Market Concepts** (Economics, Currencies, Fixed Income, Equity) **2018**

## PROFESSIONAL EXPERIENCE

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- Teaching Assistant**, Smith School of Business, Queen's University, Kingston, Canada **2017-2018**
- Timely and accurately graded assignments and examinations for Managerial Economics undergraduates for two terms
  - Provided student support on an individual and group basis to reinforce learning concepts resulting in great student feedback
- Corporate Tax Intern**, Deloitte & Touche, Dalian, China **2016**
- Assisted tax declarations, contract development, tax provisions, and data review, enhancing group work efficiency
  - Acquired better understanding of financial statements, especial income and cash flow statements
  - Analyzed figures by using Excel (pivot tables, VLOOKUP. etc) for supporting documents
- Customer Service Representative**, China Construction Bank, Dalian, China **2016**
- Provided excellent customer service assisting with basic product information, financial transactions and product promotion, which led to high customer satisfaction and strong working relationships with clients
  - Gained recognition through presentations and internal meetings from co-workers
- Audit Assistant**, Dalian Huixin Accounting Firm, Dalian, China **2014**
- Prepared audit working papers, checked accounting vouchers, and assisted with inventory audit of a local company
  - Conducted extensive evaluation on the client's operating division expenses, supervised documents delivery

## EXTRACURRICULAR EXPERIENCE

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- Team Member**, McGill International Portfolio Challenge, Montreal, Canada **2018**
- Worked in a 4-members team to write a report to solve the potential shortfall for a pension fund
  - Developed the liability driven investment strategy to invest in equities, fixed income, real assets and other assets
- Volunteer**, Multicultural Youth Group, Immigrant Services Kingston & Area, Kingston, Canada **2017-2018**
- Organized various activities to facilitate the integration of youth into their new communities, provided mentorship to youth which earned their trust and respect
- Leader**, *Creative Youth* National Undergraduate Entrepreneurship Competition, China **2016**
- Obtained Honorable Mention Award when leading a team of 5 members to participate in the competition
  - Provided supervision of organizing committee, project creativity, work allocation and presentation of the business plan
- Volunteer**, the Ninth Annual Meeting of the New Champions (Summer Davos Forum), World Economic Forum, China **2015**
- Obtained Outstanding Youth Volunteer Award through working at the information desk, duties included leading guests into the forum, and helping guests to solve problems