

NAME

ADDRESS

EMAIL

PHONE NUMBER

**EDUCATION**

**Queen's University**

**Kingston, Ontario**

*Bachelor of Commerce*

*Class of 2015*

- Year GPA 3.70; CFA Level 2 Candidate, Financial Risk Manager Candidate 2016
- Queen's University Investment Counsel Member, responsible for managing a \$700K investment portfolio
- Winner of HEDGE Prize for Young Canadians in Finance; essay recognized by the Executive Director at Stanford
- Completed international exchange at Tsinghua University School of Economics and Management in 2014

**WORK EXPERIENCE**

**Optimus SBR**

**Toronto, Canada**

*Management Consulting Analyst – Financial Services Group*

*August 2015- March 2016*

- Provided project management and expert interviews for the Wholesale Parameters Enhancement Program at one of the top 5 banking institutions in Canada
- Developed regulatory and internal controls requirement to enhance the bank's approach and implementation of estimating several risk management metrics across its wholesale banking portfolio
- Automated data collection process while recommending improvements using Visual Basic for Application tools to increase efficiency by 70% for the team of consulting analysts

**Mercuria Energy Trading Group**

**Shanghai, China**

*Sales and Trading Intern—Oil & Gas*

*June 2014- August 2014*

- Mercuria is a top five commodities trading house globally with US\$100 billion of turnover in 2012, based in Switzerland
- Assisted physical traders to invest in physical asset globally focusing on iron ore, coal, and clean fuels
- Conducted research using research reports, company reports, and Bloomberg to select relevant comparable companies and precedent transactions
- Completed a 3-month work term with a focus on the Chinese oil and gas, metals and mining sectors

**LEADERSHIP**

**Queen's Value Investment Club**

**Kingston, Canada**

*Portfolio Manager— Investment Management*

*Sept 2013- May 2014*

- Maintained a coverage universe of 30 companies in the consumer sector
- Developed and presented weekly updates on recent market news, industry outlooks and current holdings of \$500, 000
- Analyzed sector opportunities and developed stock pitches to manage fund simulation

**ADDITIONAL INFORMATION**

*Language:* Business proficient in Mandarin Chinese

*Modeling:* Completed The Marquee Group Financial Modeling workshop, Toronto Learns to Code workshops

*Computer:* Proficient in Excel, PowerPoint, Bloomberg, Upgrade Capital, and Thompson ONE Analytics

*Certifications:* Completed Bloomberg's Aptitude Certification Program; 2015 CFA Institute Access Scholarship

*Volunteering:* Junior Board Member, Optimus Women's Network, Non for Profit Consultant for Catching Fire

*Interests:* Travelling, cross-country running, volunteering, stand up paddle boarding, and cross country skiing