

## **EXPERIENCE:**

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### **JP Morgan Chase Co.**

New York, NY

*RWA Automation Analyst (Senior Associate)*

April 2022 - Present

- Process improvement for the CIB Treasury Controllers using business tools such as Alteryx and Tableau to reduce runtime and manual touch points.
- Automate and enhance current processes to reduce man hours and reallocate company resource for high level analysis
- Manage and maintain up to date Solution Design Documents and Procedures for Intelligent Solutions for the CIB Treasury Controllers team
- Create Tableau dashboards with seamless connections to Alteryx output for period over period forecast

### **Brown Brothers Harriman & Co.**

New York, NY

*Treasury Analyst (Associate)*

January 2021 - March 2022

- Collaborate with Finance Technology team on user acceptance testing projects with over 300 test cases related to defect tracking, application updates and implementation for critical systems
- Utilize performance dashboards to model different scenarios within the market to identify areas to improve efficiencies and to forecast potential areas of concerns ahead of time and propose viable action steps
- Discerned areas for process improvement in Excel reporting, implemented updates to reduce manual risk and processing time, and created procedures and other relevant documents for new users
- Perform data analysis and create ad-hoc/custom reports for senior management leveraging Hyperion databases and Excel with same day turnaround
- Compile daily, monthly, and quarterly performance and analytics reports to clients, managing directors, and partners displaying key performance metrics and returns on investment
- Analyze large sets of data and historical trends with self-created Excel spreadsheets to convert datasets into easily legible formats and useful information to manage over fifty billion USD equivalent of liquid assets in multiple currencies abiding to industry standards and international market deadlines
- Manage hundreds of customized client profiles abiding to client requirements, domestic industry standards as well as international
- Act as an escalation point for the client support teams on complex client inquiries for cash management product
- Self-taught new Excel concepts in order to enhance ability to create and improve Excel reporting and processes
- Improved on processes to reduce manual risk as well as man-hours via automation in Excel

*Senior Client Account Manager*

October 2015 - January 2017

- Led monthly management calls to discuss results, team performance, and future projects with senior management at client firm
- Launched and liquidated 100 plus share classes including passive hedging, derivatives, fair valuation, and other complexities
- Spearheaded and managed mutual fund launches with strong attention to detail and coordination between in-firm teams and the client to ensure proper implementation within the firm and regulatory bodies
- Trained and prepared employees on proprietary systems software, operating procedures and Excel skills
- Assisted, tested, and oversaw the creation of Excel Macros to streamline processes and reduce delivery time
- Provided accurate, complete, and timely reports for client on daily, weekly, monthly, and quarterly basis

## **SKILLS**

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**Language:** Fluent in Cantonese. Proficient in Mandarin (5 yrs).

**Technical:** Microsoft Office Suites

SQL (1 year), Java (1 year) - Ability to research and self-teach foundational concepts

Alteryx (Certified)

Tableau

**Leadership:** Coordinator for Asia Link (BBH Affinity Network Community)

## **EDUCATION:**

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**Boston University School of Management**

May 2014

Bachelor of Science in Business Administration

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