

Education

University of Notre Dame (Notre Dame, IN) May 2024
Bachelor of Business Administration - Business Honors Program Dean's List Fall 2020, Fall 2021, Spring 2023
Finance and Applied Computational Math & Statistics, Minor in Business Technology 3.74/4.0

Relevant Experience

Applied Investment Management (AIM) LVIII • *ND Dept. of Finance* January 2024 - May 2024

Asset Management Products Summer Analyst • *JPMorgan Asset Management* June 2023 - August 2023

- Researched high yield credit on a three-pronged "Fundamental, Quantitative, Technical" bottoms-up approach
- Presented credit review to senior management, ranked top of 6 US fixed income interns cross-company
- Coded fragment of mechanized portfolio trading, part of long-term collaboration with Quant Solutions team

Quantitative Algorithm Strategist, Trinitas Capital Project Leader • *ND SIBC* June 2023 - December 2023

- Created trading strategies on student-built platform, helped manage 3 sub-teams (algo, infrastructure, backtest)

SEC Scholars Program • *Div. of Examinations, US Securities & Exchange Commission* May 2022 - August 2022

- Conducted examinations of Investment Advisers/Investment Companies for compliance with IA&IC Acts of 1940
- Compared investors' objectives and suitability preferences against adviser determinations for best interest
- Manually combed through IA/IC trade blotters to review trading patterns associated with securities law violations

Research Assistant • *Prof. John Shim, Mendoza College of Business, Finance* June 2021 - February 2022

- Independently developed efficient scripts to analyze & summarize large NYSE TAQ daily trade data (1993-2021)
- Wrote necessary helper code in Python, shell, LabVIEW to funnel and filter input files on a grid computing server
- Paper pending, unpublished work surrounding topic of adverse selection of uninformed investors by hedge funds

Executive Controller • *ND Student Government* April 2022 - April 2023

- Managed and maintained the budget for all of Student Government (Executive Cabinet departments and Senate)
- Prepared and proposed the administration's allocations to the Student Union Financial Management Board (FMB)
- Collaborated with financial officers of each Student Union branch at FMB to manage a \$500k operating fund

PwC Project Leader • *ND SIBC* January 2022 - May 2022

- Leveraged Excel to draw conclusions from a sample data set of cyber-insurance claims and their claimants
- Co-led project travel team of ten posing as consultants, taught Excel and tuning team presentation skills

Stock Pitch and Valuation • *ND Investment Club (NDIC)* March 2021

- Specialized in developing the quantitative analysis for Pool Corp. (NASDAQ:POOL), using Excel and S&P CapitalIQ
- Calculated DCF and exit multiple valuation with comparable analysis, found POOL was 23% undervalued (average)
- Presented with three teammates, projection exceeded after one month, POOL was up 45% one year later

Puzzle Leaderboard • *Quant Club (QCND)* August 2021 - December 2021

- Tied for #4 on the weekly puzzle leaderboard, ranked by time-to-solve a probability or quantitative problem

Microsoft, Uber, Deloitte Projects • *ND SIBC* Spanning September 2020 - May 2021

Leadership & Non-academic Experience

Varsity Team Member • *ND Men's Rowing* September 2021 - Present

- Finished 9th in Men's Novice 4+s at ACRA (American Collegiate Rowing Association) Championships (May 2022)

Student Ambassador • *2023 Notre Dame CEO Conference* April 2023

Notre Dame Student Representative • *Student Lobby Day, Independent Colleges of Indiana* March 2023

Classroom Triage & Support Assistant • *ND Office of Information Technologies (OIT)* August 2020 - May 2021

Director of Campus Tech. and Innovation • *ND Student Government, Executive Cabinet* April 2021 - April 2022

- Sat on OIT subcommittees and advisory councils, provided feedback from the student body
- Projects undertaken: mobile phone campus ID access, replacing Sakai LMS, replacing SAO360, among others

(Inaugural) Freshmen Involvement Commissioner • *Knott Hall Government* September 2020 - April 2023

- Led Knott's freshmen dorm engagement and hall government coordination, important Welcome Week contributor
- Served in ND First-year Class Council (2020), planned large all-class social events with Social committee in COVID

Coach & Lecturer • *Canterbury School Summer Chess Camp* Summers of 2017 - 2021

Skills & Abilities

- Certifications: Tableau Desktop Specialist, Magnet Certified Forensics Examiner (AXIOM). Seeking: CFA Level 1
- Fluent in Java, Python, JavaScript, Visual Basic (VBA, Script), R, LabVIEW, among other programming languages
- Experienced with: SQL, Bloomberg Terminal, Microsoft Office, AWS, Postman & HTTP API reverse engineering
- Languages: Native English, fluent Mandarin Chinese, intermediate Spanish

Hobbies: Chess • Piano, Oboe, and Percussion • Speech and Debate