

# Jimmy Liu

## EDUCATION

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- Rotman School of Management & Department of Economics, University of Toronto** Toronto, Ontario  
*Master of Financial Economics* *Jul 2022 – Dec 2023*
- **Awards:** Master of Financial Economics Scholarship (\$3,000)
  - **Relevant Courses:** Corporate Financing II, Options & Futures Markets, Econometrics, Macroeconomics, Microeconomics
- DeGroote School of Business, McMaster University** Hamilton, Ontario  
*Honours Bachelor of Commerce (Major in Finance, Minor in Economics)* *Sep 2017 – Apr 2022*
- **Academics:** cGPA 3.92/4.0
  - **Awards:** The I.O.D.E Hamilton Martha Serrels Academic Award (\$1,000), The University Senate Scholarship (\$800)
  - **Relevant Courses:** Securities Analysis (A+), Valuation (A), Managerial Finance (A+), Financial Modeling (A), Options & Futures (A+)

## INDUSTRY CERTIFICATIONS

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- Passed CFA Level I 2021
- The Marquee Group: M&A Modeling, DCF Modeling, Accounting 2022
- Corporate Finance Institute (CFI): Valuation Modeling, Financial Statements Analysis 2022
- Bloomberg Market Concepts (BMC): Equities, Fixed Income, Economic Indicators, Foreign Exchange 2020

## PROFESSIONAL EXPERIENCE

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- IBM** Markham, Ontario  
*Intern – Financial Analyst* *May 2020 – Aug 2021*
- Consolidated financial data using Excel and SQL of a portfolio consisting of ~150 contracts generating ~\$16M in quarterly revenue
  - Performed financial forecasting and financial performance evaluation to support leadership team decision-making
  - Identified root causes and recommended solutions on various topics such as recurring contract issues, GP loss, and backlog-yielding
  - Led meetings and discussions with internal project managers and operation teams regarding contract logistics and financial reviews
  - Automated a portion of the financial consolidation process in Excel, saving ~6 hours in each month-end cycle
- Itian Canada Inc.** Toronto, Ontario  
*Assistant Manager* *May – Aug 2019*
- Procured new clients through presenting printing materials and maintaining client relations, increasing revenue by ~\$5,000 YoY
  - Managed a team of 3 under a fast-paced working environment to meet the deadline of each client's order
  - Conducted market research on local competitors through a series of product comparisons and SWOT analysis

## EXTRACURRICULAR ACTIVITIES

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- MCCA & CIBC Private Wealth Management Case Competition** Hamilton, Ontario  
*Team Lead* *Oct 2021*
- Placed 1st against ~10 teams and was awarded the Top Individual Award among ~50 students
  - Conducted analysis on Gen Z and proposed a business plan on attracting and building long term relationships with Gen Z
- IBM** Markham, Ontario  
*Events Planner, Employee Charitable Fund* *Sep – Nov 2020*
- Planned and executed various virtual charity events of over 70 attendees, raising over \$1,700 to donate to a local food bank
  - Led virtual info sessions to raise awareness, leading to increased attendance and fund-raised year-over-year
- Mathematical Investment Research Council** Hamilton, Ontario  
*Analyst* *Nov 2019 – Apr 2020*
- Actively participated in weekly meeting discussions to facilitate the process of idea generation and investment strategy
  - Analyzed a retail company and supported investment thesis by performing DCF analysis and relative valuation for a buy decision
- DeGroote School of Business** Hamilton, Ontario  
*Teaching Assistant – Managerial / Corporate Finance* *Sep 2019 – Apr 2020*
- Managed proctoring, grading, and office hours for a class size of ~700 students

## PERSONAL

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- **Skills:** Excel, PowerPoint, Familiar with Python, Refinitiv Eikon, Capital IQ, SQL, Beginner in Bloomberg Terminal, FactSet
- **Languages:** English (Fluent), Mandarin (Native Speaker)
- **Sports:** Basketball (Point-guard, Bronze Medalist - Junior highschool tournament in Fuzhou, China), Table tennis, Badminton
- **Interests:** Thrill seeker (Bungee jumped from top of a mountain), Karaoke enthusiast, Solving Sudoku (medium level ~ 3 minute)