

Steve Wu

EDUCATION

Rotman School of Management & Department of Economics, University of Toronto Toronto, Ontario
Master of Financial Economics Jul 2023 – Dec 2024

- **Upcoming Relevant Courses:** Options and Futures; Macroeconomics; Microeconomics; Econometrics; Financial Economics; Corporate Financing II; Security and Portfolio Analysis

Fisher School of Business, The Ohio State University Columbus, Ohio
Bachelor of Science (Major in Business Administration, Specialized in Finance, Minor in Economics) Aug 2020 – Dec 2022

- **Academics:** cGPA 3.76/4.0
- **Awards:** Graduated with *Magna Cum Laude*; Dean's List
- **Relevant Courses:** Trading & Markets (A); Fixed Income (A); Options and Futures (A); International Finance (A); Macroeconomics (A); Microeconomics (A-); Investment Strategies(B+); Global Finance (A); Corporate Finance (A); Investments (A); Accounting (A); Private Financing (A-); Financial Data (A)

INDUSTRY CERTIFICATIONS

- Corporate Finance Institute: Fixed Income, DCF Valuation, M&A Modeling, Accounting 2023
- The Marquee Group: DCF Valuation, Financial Statements, Merger Modeling 2023
- Bloomberg Market Concepts: Equities, Fixed Income, Currencies, Economic Indicators 2021

PROFESSIONAL EXPERIENCE

GF Securities Beijing, China
Intern – Wealth Management Mar 2021 – Jun 2021

- Assisted 100+ clients with portfolio allocation based on AI-Driven analysis and promptly addressed market inquiries
- Acquired 50+ new clients with opened accounts through the successful execution of over 2000 cold calls
- Performed financial due diligence on 10+ private companies, identifying significant changes in shareholders
- Used Excel and PowerPoint materials to aid associates in preparing presentations for staff and client meetings

RELEVANT ACADEMIC PROJECTS

Trading Competition 2022

- Achieved 1st place in the Trading Competition, outperforming a competitive pool of 60+ participants
- Executed 15 institutional orders across 4 securities, contributing to a total revenue generation surpassing \$130,000 over 10 rounds
- Thrived in diverse market conditions and performed exceptionally well under both liquid and illiquid markets

Qualified Opportunity Fund, Residential Multi-Family 2022

- Collaborated with a team of six to develop a plan for establishing a QOF in accordance with the Tax Cuts and Jobs Act
- Conducted thorough financial analysis to predict the potential return on investment for the QOF and assessed various exit scenarios
- Presented the plan and financial projections using PowerPoint to key stakeholders at the Ohio Innovation Fund

EXTRACURRICULAR ACTIVITIES

Chinese Students and Scholars Society Columbus, Ohio
Deputy Director – Outreach Department Aug 2020 – Aug 2022

- Facilitated valuable academic and professional resources, creating an inclusive networking environment for Chinese students at OSU
- Worked closely with the Consulate General of the People's Republic of China and attended consulate meetings semi-annually
- Networked with 70+ student associations and held 10+ information sessions with companies including P&G, Huawei, and Cummins
- Oversaw the daily management, including personnel management, activities, and publicity work (WeChat, Weibo, Bilibili, Instagram)

Red Cross Society Guizhou, China
Volunteer May 2018 – Aug 2021

- Committed over 400 hours to supporting low-income communities, with a primary focus on schools and daycare centers
- Empowered and nurtured left-behind children by providing daily care, mentorship, and nutritious meals, fostering a safe and enriching environment for their growth and well-being

PERSONAL

- **Technical skills:** Familiar with Excel, Bloomberg Terminal Services
- **Languages:** English, Mandarin (Native)
- **Interests:** Sports trading cards (soccer & basketball), thrill seeker, Hunan cuisine, devoted dog dad (Cockapoo), timepieces, Real Madrid