Jerry Pan

EDUCATION

Rotman School of Management & Department of Economics, University of Toronto — Toronto, Ontario
Master of Financial Economics — *Jul 2023 – Dec 2024*
- **Awards:** Graduate Scholarship
- **Relevant Courses:** Corporate Financing II; Financial Statement Analysis; Business Analysis and Valuation; Econometrics; Microeconomics; Macroeconomics; Financial Economics

University of Waterloo — Waterloo, Ontario
Bachelor of Mathematics (Double Major in Financial Analysis and Statistics) — *Sep 2017 – Dec 2022*
- **Academics and Awards:** 3.7/4.0 GPA, President's Scholarship of Distinction
- **Relevant Courses:** Corporate Finance (A); Intermediate Accounting for Finance (A+); Money and Banking (A+); Financial Statement Analysis (A+); Income Tax for Finance Students (A+)

INDUSTRY CERTIFICATIONS

- CFA Level I Passed — *Jan 2023*
- Corporate Finance Institute (CFI): Business Valuation Modeling, M&A Modeling, Corporate Finance — *Feb 2023*
- Marquee Group: Accounting Financial Statements, DCF Valuation, Merger Modelling — *Jul 2023*

PROFESSIONAL EXPERIENCE

Ontario Teacher's Pension Plan — Toronto, Ontario
Investment Analyst Co-op, Private Markets Risk Modelling, Investment Risk — *Sep 2021 – May 2022*
- Developed risk models for private capital investments in equities, natural resources, and infrastructure portfolios using Valuation Models (DCF and Multiple) and incorporating macroeconomic factors to assess their impact on key valuation drivers
- Generated default probabilities for private companies by implementing Moody's methodology to determine credit ratings based on industry specific financial metrics
- Streamlined weekly risk reporting tasks by utilizing Excel VBA to explain weekly changes in portfolio risks

Ontario Ministry of Education — Toronto, Ontario
Data Analyst Co-op — *Jan 2020 – May 2020*
- Developed a predictive school board enrollment model by implementing a multivariate Poisson GLM to estimate enrollment and compare relative rates for school boards with R
- Led debrief session to review the efficiency of school board funding authentication process and identified areas of improvement

Sport & Social Group Inc. — Toronto, Ontario
Finance Associate Co-op — *May 2019 – Sep 2019*
- Improved revenue bookkeeping efficiency by 75% through using Excel VBA to create more streamlined procedures and documentation
- Implemented exponential moving average method to forecast inventory requirements for upcoming season

Carl Zeiss Vision Canada Inc. — Toronto, Ontario
Accounting Assistant Co-op — *May 2018 – Sep 2018*
- Assisted in improving efficiency for sales rewards program management by utilizing Excel Macros to streamline procedures and provided data for accounting accruals (sales rewards allowance, warranties, etc.)
- Conducted balance sheet reconciliations for inventory and sales discount accounts

EXTRACURRICULARS AND RELEVANT PROJECTS

University of Waterloo Fashion for Change — Waterloo, Ontario
Sponsorship Manager — *Sep 2017 – May 2019*
- Raised $97,000 for WE Charity's efforts in rebuilding communities in Moyamba, Sierra Leone by negotiating with companies in Kitchener-Waterloo and formalizing sponsorship contracts for the annual charity fashion show

University of Waterloo FARM Stock Pitch Competition
- Collaborated with a group of four students to conduct a valuation of Cedar Fair and presented a stock pitch to a panel of professors
- Determined discount rates, cash flow forecasts, and created industry peer group by utilizing Bloomberg and Capital IQ
- Calculated a range of share prices for Cedar Fair by conducting a relative valuation with P/E, P/B, and EV/EBITDA multiples

PERSONAL

- **Technical Skills**: Familiar with Excel, Bloomberg Terminal Services, Capital IQ; Familiar with VBA, R, SQL and Python
- **Hobbies:** Soccer, Tennis, Running, Cycling, Reading (Good Read: Shoe Dogs), Boardgames
- **Interests**: Sports (EPL, ATP, WTA), WW I and II History, Podcasts (JRE, All-In)