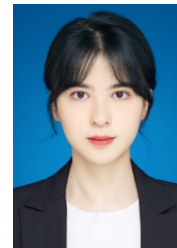


ZHANG YAOJIA, ZOE

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EDUCATION

The Chinese University of Hong Kong, Hong Kong

Aug 2015 – July 2020

- B.B.A., Professional Accountancy, Minor in Finance
- Cumulative GPA: 3.64/4.00, Major GPA: 3.75/4.00, BGS Honors, First Class Honors
- Selected coursework: *Investment Analysis & Portfolio Management, International Finance, Data Analytics, Corporate Finance, Options and Futures, Securities Regulation, Financial Management*
- Honors: Dean's List, Honors at Entrance, HKICPA Scholarship, Yasumoto Int'l. Exch. Scholarship, Scholarship for Outgoing Exchange Students, Reaching Out Award, College Head's List, College General Education Scholarship
- Study Abroad: University of Miami, Aug 2017 - Dec 2017, CGPA 4.0/4.0

INTERNSHIP EXPERIENCE

Lord Abbett China Asset Management Co., Ltd

Shenzhen, CN

Winter Intern, Quantitative Researcher

Nov 2019– Jun 2020

- Help finish research reports on Chinese as well as foreign capital market like the research on Target Date Fund
- Research and conduct a report of trading strategy on the relationship between capital inflow and index price using Python

The Hong Kong and Shanghai Banking Corporation Limited (HSBC)

Hong Kong

Co-op Student Trainee, Retail Banking and Wealth Management (RBWM), Finance/Tax

Aug 2018– Jan 2019

- Assisted with internal tax advisory and risk assessment, including data mining, data analysis, and information verification
- Provided tax advisory on new financial products such as fixed income securities for the RBWM team
- Facilitated periodical database updates for tax calculation purposes, and presented all results regularly to the internal teams
- Voluntarily assisted other teams in reviewing and resolving tax transparency cases in the customer due diligence process

Guoyue Junan Equity Investment Fund Management Co., Ltd

Shanghai, CN

Summer Intern, Investment Assistant

June 2018 – July 2018

- Assisted the investment manager with industry research on start-ups to evaluate potential investment possibilities
- Generated 10+ research reports on target companies and industries such as life sciences, healthcare and technology hardware
- Discussed portfolio company assessment and new investment opportunities weekly in internal meetings

PricewaterhouseCoopers Limited (PwC)

Central, HK

Winter Intern, Assurance – Financial Service

Jan 2018 – May 2018

- Assisted in the auditing service for clients, including investment banks, asset management firms and insurers
- Participated in the Anbang Opportunity Fund auditing process and reported to manager directly to ensure progress
- Rotated among project teams, analyzing data and evaluating investment performance for third parties

City Construction Investment (group) Company Limited

Chongqing, CN

Summer Intern, Investment Assistant

July 2017 – Aug 2017

- Assisted the investment team with data mining on financial institutions, assessed proposals, and shortlisted the target list
- Analyzed 50+ pages of memorandums, and negotiated with external LPs on term sheets and timeline
- Drafted both financing and relevant legal documents in accordance with requirements from various stakeholders

PROJECTS AND ACTIVITIES

CGMA A-star Programme CIMA Scholar Beijing, CN

Mar 2019 – Aug 2019

- Joined Winter and Summer Camps in Beijing and Shanghai for managerial accounting courses organized by HKICPA|CIMA
- Passed Strategic Case Study (SCS) Exam on Oct 2019

CQA Institute – Advanced Investment Management Course Wilkes Barre, USA

May 2019

- Attended two weeks quantitative course taught at Wilkes University by top Wall Street Investment professionals
- Won the final case study competition by taking the team role of portfolio manager among 5 teams

JA Business Ethics Program Group Leader Hong Kong

Mar 2017

- Guided a group to analyze ethical issues in finance & accounting industries; won the best group among 30 classmates

ADDITIONAL INFORMATION

- IT Skills: Microsoft Office (Word, Excel, Outlook, PowerPoint), Bloomberg, Wind, Markit, R, Python
- Language Skills: GMAT 710 90% (Q 50 85%, V 35 76%, W 4 17%, IR 4 35%), TOEFL 103 (R 30, L 23, S 24, W 26)