

LIN Zijun Jorie

Email: zijun.lin@link.cuhk.edu.hk

Education

The Chinese University of Hong Kong, CUHK Business School, Hong Kong SAR, China **Aug 2023 – Present**
Major: PhD Programme in Finance

New York University, Tandon School of Engineering, New York, United States **Aug 2020 – May 2022**
Major: Management of Technology (Data Analytics Track) | Degree: M.Sc. | **GPA: 3.875/4.0**
Project (Capstone): Pricing and Sales Projection for a Startup in Smart Rehab Equipment Industry
Relevant Courses: Financial Analysis for Tech Managers, Business Analytics, Management of Information Technology and Information Systems, Economics and Strategy, Programming for Business Intelligence and Analytics, Data Engineering, Machine Learning for Business, Statistics for Data Analyst, Data Visualization for Business Intelligence

Simon Fraser University, Beedie School of Business, British Columbia, Canada **May 2016 – Aug 2019**
Major: Finance | Degree: B.B.A. | **GPA: 3.22/4.33**
Relevant Courses: Principles of Macroeconomics, Principles of Microeconomics, Managerial Economics, Managerial Accounting, Financial Accounting, Business Technology Management, Introduction to Finance, Derivative Securities, Introduction to Statistics, Data and Decision, Chance and Data Analysis, Experiment/Observational Data, Calculus II for Social Science

The Chinese University of Hong Kong, Chung Chi College, Hong Kong SAR, China **Aug 2018 – Dec 2018**
Major: International Asian Studies Programme (Exchange Student)
Relevant Courses: International Finance, Investment Analysis and Portfolio Management

Conference & Paper

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- ◆ **Z.J. Lin**, “*Digital Finance Evolution in Economic Crises*”, 2022 2nd International Conference on Digital Economy, Management and Education (CDEME 2022) (*Accepted*)
 - ◆ **Z.J. Lin**, Y.N. Wang, “*The Impact of Technology Expenditure on the Commercial Banks' Profitability in Canada*”, Proceedings of the 2022 International Conference on Economics, Smart Finance and Contemporary Trade (ESFCT 2022) (pp. 220-227). Atlantis Press. https://doi.org/10.2991/978-94-6463-052-7_26

Research Experience

Pricing and Sales Projections for a Startup in the Orthopedic Rehabilitation Industry **Jan 2022 – May 2022**
New York University

- ◆ Aimed to achieve a forecast of the target company's sales of smart crutch tips after entering the US market to understand whether the company can enter and substantially grow in the new market, if not, what exit strategy should be considered for company
- ◆ Conducted primary market research on interview PT clinics and rehabilitation centers in the HSS network to estimate market size for the product
- ◆ Investigated the company's sustainability to grow in the rehabilitation industry through secondary research on authenticated published articles

MalaCards Search Engine Reconstruction **Oct 2021 – Dec 2021**
New York University

- ◆ Highlighted the necessity in relocating important features in the search engine to improve the efficiency of getting a more precise result targeted the right diseases from the search engine
- ◆ Reconstructed MalaCards search engine by adjusting the weight distribution on specific features in Malady evidence indexes, applied K-means on the term frequency to split the subgroup
- ◆ Utilised elbow method to determine the optimal number of clusters

Exploratory Data Analysis and Simulation of COVID-19 Fatalities **Sep 2021 – Oct 2021**
New York University

- ◆ Compared COVID-19 fatalities forecast accuracy between different simulation models on 30 USA states data from government public open-data resource to determine the simulation model with relatively higher accuracy to forecast the fatalities of Covid-19 that can be applied into the real-world practice
- ◆ Applied the train data into machine learning different algorithms and Monte Carlo Simulation to compare the accuracy of each simulation model
- ◆ Highlighted that Monte Carlo Simulation provides the most accurate result

Evaluation of Cyberthreats in Financial Industry **Sep 2021 – Oct 2021**
New York University

- ◆ Analyzed reasons behind cyberthreats happened and negative impact brought to the affected financial institutions
- ◆ Proposed countermeasures to enhance securities within companies in the financial industry
- ◆ Conducted a case analysis of 2018 Bank of Montreal data breach incident, researched through published academic literatures on related topic to strengthen and support the proposal

Working Experience

Consultant, Ernst & Young (China) Advisory Limited, *Guangzhou, China*

Nov 2022 – May 2023

Technology Risk, Consulting

- ◆ performed IT-related procedures in support of financial statement audits and/or as part of the integrated audit, including evaluating IT general control design, operating effectiveness and testing application controls
- ◆ Helped clients address technology risks in day-to-day IT/business processes, as well as risks in adoption of emerging technologies and major business/technology transformations

Course Teaching Assistant, New York University, *New York, United States*

Sep 2021 – May 2022

Economics and Strategy

- ◆ Supervised a large group of class for over 90 students and assisted faculty with all course-related administrative duties, including assignments and exams grading and feedback providing, exams proctoring, lecture materials and assignments mentoring, technical support for both synchronous and asynchronous lecture
- ◆ Executing weekly tasks and schedule distribution among teaching assistants
- ◆ Held office hour on weekly basis and conducted in-depth research in prior on multiple course-related business cases on Wall Street Journal to guide students with better understanding of lecture materials and assignments

Intern Analyst, China Merchant Securities, *Guangzhou, China*

Jan 2021 – Jul 2021

IPO, Intelligent Manufacturing Division

- ◆ Participated in two initial public offering projects for communication equipment manufacturing companies with \$60 million asset. Collaborated directly with client CFOs in handling due diligence requests related to financial reports
- ◆ Assisted corporation to prepare IPO responses to questions from Issuance Examination Committee and implemented improvements as demanded
- ◆ Conducted research on industries and government regulations by using financial terminals and relevant public references to prepare three IPO pitchbooks, involving targeted companies in Baijiu, Intelligent Manufacturing and Silicon Steel industries

Senior Customer Service Representative, Bank of Montreal, *British Columbia, Canada*

Feb 2017 – Jul 2020

Personal and Commercial Banking

- ◆ Provided daily banking transaction in professional manner, understood customers needs through quality conversations. Identified opportunities to match up customers with specialized financial service manager to offer customers with supportive and targeted services
- ◆ Assisted the Assistant Branch Manager to provide six-week one-on-one mentorship CSRs training program to the new hire

Data Analyst Intern, Allied Millennial Partners, *New York, United States*

Sep 2019 – Nov 2019

Investment Department

- ◆ Researched on targeted industries and companies to provide investment recommendations under senior advisor's instruction
- ◆ Facilitated investment recommendation by analyzing targeted companies financial reports and utilized fundamental financial ratios such as EBITDA and P/E to evaluate targeted companies operation in last three years and investment risk
- ◆ Prepared the investment pitchbook on PowerPoint by visualizing targeted companies' internal financial/stock performance and the macro industry's moving trend by using Excel and Tableau and issued an investment recommendation under senior analyst supervision

Miscellaneous

- ◆ **Language:** English (Fluent), Cantonese (Native), Mandarin (Native)
- ◆ **Skills:** Power BI (Proficient), Tableau (Proficient), Python (Proficient), R (Intermediate)
- ◆ **Certificates:** CFA Level 1 & Level 2 Passed, Securities Qualification Certificate
- ◆ **Others:** Recipient of CUHK Postgraduate Studentship (2023), NYU Graduate Scholarship (2020)