

YAN LUO

2018 Knapp St, Saint Paul, MN 55108

Tel: (952) 221-2698

Email: luox126@umn.edu

EDUCATION

UNIVERSITY OF MINNESOTA, TWIN CITIES

Minneapolis, MN

Candidate for Master of Financial Mathematics

Expected Graduation: May 2010

LOUGHBOROUGH UNIVERSITY

Loughborough, Leicestershire, UK

BSc (Hons) Mathematics, Accounting and Financial Management

2003–2006

WORK EXPERIENCE

EXCEL FINANCIAL SERVICES

Downers Grove, IL

Mortgage Loan Coordinator

Summer 2009

- Provided administrative and loan processing support to the Sales Office
- Conducted mortgage sales pitches and gathered due diligence documents from related parties
- Managed appraisal, title forms, certifications and miscellaneous mortgage documents

HSBC BANK

Shenzhen, Guangdong, China

Client Service Associate

2007–2008

- Analyzed option portfolios, produced sales reports for regional offices and designed customized pricing models for major clients
- Helped to achieve a monthly branch deposit growth goal of \$3.4 million
- Organized professional events for clients and negotiated contracts with venue providers and sponsors
- Created balance score cards for the purpose of employee performance assessment
- Provided administrative support to managers, played major role in the implementation of the group's Anti-Money Laundering Program and ensured compliance with local regulations

CHINA CONSTRUCTION BANK

Shenzhen, Guangdong, China

Customer Service Representative

2006–2007

- Provided efficient counter service by performing professionally, promptly and accurately for all transactions, handled customer enquiries and solved their problems to improve customer satisfaction
- Supported branch service and sales strategy in cross-selling and proactively referred potential customers to appropriate departments
- Prepared internal and external reports and supported daily branch ATM operations

DAGONG GLOBAL CREDIT RATING

Shenzhen, Guangdong, China

Intern Analyst

Summers 2004–2005

- Analyzed audited financial statements, economic data and market data, contributed to drafting reports and presented rating recommendations to the internal committees
- Studied and interviewed clients to gather in-depth information to discover companies' potential risks
- Constructed Excel database that provides the team with analytical financial results
- Checked credit history from The People's Bank (Central Bank of China)

COMPUTER SKILLS

Microsoft Word, Excel, Power Point, Access, Maple, SPSS, MATLAB and C#

LANGUAGE SKILLS

Fluent in English, Mandarin and Cantonese

ACTIVITIES

- Member of CFA Society 2008–Present
- Executive Committee Member of CSSA, UK, Loughborough University, Public Relations 2005–2006
- Member of ACCA, UK Fast Track Scheme 2004–2006
- Member of ISA (International Student Association), Loughborough University, UK 2003–2006
- Certificate, 'Insight into Management', Careers Centre, Loughborough University, UK 2005
- Certificate, 'Technology Chances - Introduction to Technology in Investment Banking', Group GTI, UK 2004