

ANNA C. ZHANG, CFA

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EDUCATION

The Wharton School & The Lauder Institute, University of Pennsylvania

Master of Business Administration Candidate
Master of International Studies Candidate

Philadelphia, PA
May 2019 – May 2021

- **Organizations:** Investment Management Club, Restructuring & Distressed Investing, Real Estate, GUIDE, GCC, WAAAM

The Wharton School, University of Pennsylvania

Bachelor of Science in Economics, Concentrations in Finance and Management

Philadelphia, PA
Sept 2011 – May 2015

- **Honors:** *magna cum laude*, Dean's List 2014 – 2015
- **Organizations:** Alpha Kappa Psi, Wharton China Association, Penn Microfinance, 180 Degrees Consulting, ACTION

WORK EXPERIENCE

Pacific Investment Management Company, LLC (PIMCO)

Senior Account Associate

New York, NY
Aug 2015 – Apr 2019

- Presented quarterly reviews to institutional client investment teams and consultants on portfolio performance, attribution, positioning, and strategy outlook across PIMCO's fixed income offerings
- Provided updates to channel head on Non-Profit and Single Family Office metrics, including assets, run rate revenue, flows, and opportunity pipeline, to ensure \$50B+ business was on track to meet fiscal year objectives
- Built and enhanced relationships with prospective and existing clients by collaborating with product strategy on marketing materials promoting PIMCO's cash, fixed income, enhanced equities, and alternatives products and capabilities
- Managed 2017 summer internship program and was responsible for planning training sessions, supervising workload capacity, and providing feedback for five account analyst interns over course of 10 weeks
- Represented PIMCO at on-campus career fairs and recruiting events hosted by Forte Foundation and Girls Who Invest
- Trained four new analysts/associates on internal systems and coordinated their transition onto client relationships

Official Institution Client Coverage Group Involvement

- Created quarterly business updates for Executive Office on PIMCO's \$65B+ global official institution practice spanning 37 central banks, sovereign wealth funds, and supranational clients
- Planned and executed 2017 and 2018 Official Institution Educational Seminar with central bank, sovereign wealth fund, and supranational client contacts, representing \$33B+ in PIMCO assets under management, in attendance
- Hosted representatives from 10 official institution relationships with \$21B+ in assets invested across PIMCO strategies at inaugural 2018 New York Global Roundtable to discuss investment trends and macroeconomic developments

Account Analyst Summer Intern

Jun 2014 – Aug 2014

- Presented three research projects discussing the role of credit default swaps in the Financial Crisis, the methods of settling mortgage TBAs, and the Fed's QE program vs the ECB's proposed QE program to the Client Management team
- Prepared fund attribution reports and market commentary on global macroeconomic events for portfolio updates

EXTRACURRICULAR INVOLVEMENT

Nomi Network

Young Professionals Board Member, Host Committee Member

New York, NY
Aug 2017 – Present

- Promote awareness for Nomi Network and its mission to end human trafficking by providing economic opportunities to women in at-risk communities
- Generated ~\$50K in revenue from selling Nomi Network products, made by women currently enrolled in Nomi's training courses, at 2017 Union Square Holiday Market to subsidize program expenses in India and Cambodia
- Raised ~\$430K at Nomi Network's 8th Annual Gala to fund the building of five additional program sites in India

Purpose at PIMCO

Grant Review Committee Member, Pro Bono Corps Member, Volunteer

New York, NY
Aug 2015 – Apr 2019

- Reviewed and approved ~\$600K in grant proposals to support local organizations addressing critical community needs such as food security, homelessness, workforce development, and youth career and college readiness
- Built financial model to facilitate budget and contingency planning for food stability-focused non-profit
- Designed curriculum framework for workforce development non-profit looking to introduce new program offerings
- Volunteered to teach individuals basic financial literacy, mentor youths from disadvantaged communities, and mock interview students in adult-education programs for full-time jobs

ADDITIONAL INFORMATION

Certifications: Series 7, Series 63

Languages: Mandarin Chinese (fluent), Spanish (basic)

Interests: Fishing, hiking, kickboxing, microfinance