

BILL (FAN) QIAO

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EDUCATION

University of Pennsylvania – The Wharton School

Philadelphia, PA

Bachelor of Science in Economics; Minor in Japanese Language & Culture

May 2022

- Majors/Concentrations: Finance and OIDD (Operations, Information, and Decisions)
- GPA: 3.83/4.00 SAT Math Level II: 800/800
- Achievement and Organization: Dean's List 18-19, Sigma Nu (Beta Rho)
- Relevant Coursework: Accounting & Financial Report, Advanced Corporate Finance, Business Statistics, Business Economics, International Corporate Finance, Accounting & Business Analysis, Predictive Analytics, Python

PROFESSIONAL EXPERIENCE

Versailles Group, Ltd.

Boston, MA

Investment Banking Summer Analyst (M&A)

May. 2020 – Jul. 2020

- Leveraged bank's network, client database, and SIC codes to compile a comprehensive domestic and international buyer list with more than 2,000 potential buyers in a sell-side engagement for a staffing company with \$7.5 million in revenue.
- Conducted industry research and analyzed company's financial growth trajectory and margin profile, highlighting the staffing company's comparative advantages and investment highlights, which ultimately fed into an offering memorandum and a one-page teaser.
- Analyzed forecasted financial statements and evaluated the potential investment opportunity for the client using DCF and comparable company models.

Student Federal Credit Union at the University of Pennsylvania (SFCU)

Philadelphia, PA

Operation Consultant & Investment Committee Member

Jan. 2019 – Present

- Manage SFCU's investment portfolio and invest in fixed income securities by looking at coupon rates, riskiness, and maturity date to achieve return threshold, such as advising the team to invest over \$4mm into CDs of different institutions with an ultimate gain on the portfolio of 2.74 %.
- Draft Monthly Economics Review for over 2,000 clients and the entire college community, including macroeconomics trends, fixed income investments, industry highlights, and recent transaction highlights.
- Present findings to the investment committee on a monthly basis by analyzing the stock market, industry trends, recent M&As, and IPO transactions.
- Monitor transaction records, and manage membership services for over 2,000 active members.

Everbright Securities Co. Ltd. (Headquarters)

Shanghai, China

Equity Research Summer Analyst

Jun. 2019 – Aug. 2019

- Collected data from every prefecture-level city in China and evaluated 200+ investment opportunities while working directly with the Senior Director in sourcing; reported daily market fluctuations (interest rate, stock market, etc.) during morning briefings.
- Completed \$5mm offerings in bonds for a leading Chinese renewable energy corporation and one of the two largest shipbuilding corporations in China.
- Formulated equity reports and company evaluations for internal use, which include credit rating, industry and company overview, catalyst, risk, profitability, and various valuation approaches such as DCF, comparable company analysis, and precedent transactions.
- Analyzed 10+ groups of stocks in specific geographic regions with investment recommendations and composed reports to portfolio managers and senior analysts.

FT Games

Hangzhou, China

Market Analyst

Aug. 2017 – Sept. 2017

- Analyzed mobile gaming market and evaluated the company's market position based on market valuation analysis, gaming market growth, company marketing strategy and competitive advantages for potential private investors.
- Developed a potential marketing promotion plan targeting the U.S. market; initiated a foreign market expansion campaign and successfully launched the game "The Godfather."

EXTRACURRICULAR EXPERIENCE

Wharton Management Club (WMC)

Philadelphia, PA

Communications Committee

Sept. 2018 – Jan. 2020

- Promoted public image and developed public relations strategy to increase participation through WMC events.
- Pitched and won a pro bono consulting service with the Applied Management program for companies such as Septa and Eco Health Alliance, in the West Philadelphia area to improve their operational efficiency and fulfill their financial goals.

SKILLS AND INTERESTS

Languages: Fluency in Mandarin Chinese (Native), Proficiency in Japanese (6 Years & Gold Award in NJE), Spanish (2 Years)

Quantitative Skills: MS Office (Excel, PowerPoint & Word), Java, Python, R, and Wind Financial Terminal

Qualitative Skills: Communication (Online Econ Tutor in Vancouver), Teamwork, Creativity, Critical Thinking, Leadership

Interests: Pop Music, Table Tennis, Soccer, Travelling, Sushi Making, Bungee Jumping, Commercial Real Estate