

Oliver Zhang

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EDUCATION

University of Pennsylvania, The Wharton School, Freshman September 2021-June 2025 (expected)
• BS in Economics, Concentrations in Finance and Statistics | Minor: Computer Science | Cumulative GPA: 4.0

Castro Valley High School August 2017-May 2021
• Cumulative GPA: 4.27/4.0 (weighted), 4.0/4.0 (unweighted). SAT: Math 800/800 | Reading and Writing 740/800

WORK EXPERIENCE

Baylex Financials, CEO, Executive Editor September 2017-present
Website: seekingalpha.com/author/value-growth-master (or tinyurl.com/Baylex)

- Published 34 research reports with 1.07 million page views, 2 editor's picks, and 1,700 followers. \$25,000 AUM.
- Analyzed SEC filings/market trends and built valuation models (DCF). Collaborated with 6 investors and 3 editors.

Intellabridge Technology Corp. (CSE: KASH), Intern June 2021-present
• Developed Projectify, a Python-based enterprise Social Media Management solution. Acquired by KASH in June 2021.
• Built HTML scraper in Python-Selenium to source 20k start-up leads. Performed Excel data analysis on 200+ MBS.
• Proposed and co-authored white paper on blockchain-based smart bonds and applications to streamline capital markets.

Kaiser Permanente, Finance Intern June 2021-August 2021
• Earned finance-pathway certification after completing financial analysis training in America's largest healthcare system.

Eden Area Chamber of Commerce
Community & Communications Director, Intern (April 2019-April 2020) April 2019-January 2021

- Conducted digital communications and created weekly newsletters/networking events. Landed 2 retail client accounts.
- Founded Eden Eats, a local online "meal-kit" cooking show with 12,000 views. Launched "Cooking with a Cop."
- Conducted 3 research studies. Wrote 1st Eden Area Guidebook promoting community to new businesses/families.

LEADERSHIP EXPERIENCE

Financial Literacy Initiative (FLI), 501©(3) Non-Profit, Founder, Ex-President, Chairman March 2016-present
• Created 10 high school and collegiate FLI chapters across US/Canada. Managed 35 chapter leaders, \$18,000 donations.
• Financially educated 7,000+ people, supported 450 low-income families. Trained 40 IRS certified tax volunteers.

Wharton Private Equity and Venture Capital Club, Investment Analysis Committee Member September 2021-present
• Learned DCF/LBO modeling. Pitched investments at weekly meetings, developed partnership with MBA-PEVC Club.

UPenn Students Federal Credit Union, Investment Team Committee Member September 2021-present
• Excel/Python data analysis to source fixed income opportunities. Pitched acquisition targets, helped manage \$8M deposits

Wharton Investment and Trading Group, Healthcare Team Analyst September 2021-present
• Conducted DCF analysis/revenue projections for public companies as group leader. Competed in pitch competitions.

Sunshine America Organization (SAYO), 501©(3) Non-Profit, Founder, Ex-President, Advisor July 2013-present
• Led 55 members on 47+ social/environment projects: restored 37,000 ft² of trails, cultural festivals with 4,500 attendees

Boy Scouts Troop 708, Junior Assistant Scoutmaster June 2016-present
Junior Assistant Scoutmaster (2020-present), Senior Patrol Leader (2019-2020), Patrol Leader (2018-2019)
• Eagle Scout (May 2020). Led 29 scouts on 22 trips. Created female affiliate Troop 2708. Scout Spirit Award.

SELECTED AWARDS

- 3rd Place: 2019 DECA International Career Development Conference, Finance Operations Research (FOR)
- National Merit Scholarship Finalist: 2021
- Gold Level President's Volunteer Service Award: 2017, 2018, 2019, 2020 (over 2,000 service hours over 4 years)

SKILLS

Language: Fluent in Chinese (mandarin), conversational Spanish

Computer Skills: Fluent: Java, Python, HTML, Selenium, Excel, MS Office, Salesforce CRM | Proficient: OCaml, JS