

SARAH R. LEE

33 University Ave., Berkeley, CA 94720 | 650.123.1234 | www.linkedin.com/in/srlee | srlee@mail.sfsu.edu

SUMMARY

Strategically-minded Finance Professional with 3 years of proven success in financial analysis and credit research. Highly skilled at improving company's productivity through detailed analysis.

EXPERIENCE

Financial Equity/Analyst Intern, Washington Capital – Pleasanton, CA **January 2017 - Present**

- Provided analysis of industry dynamics, identification of competitors and add-on acquisition opportunities
- Performed quantitative and qualitative analysis and identify key industry trends, competitive factors and up to 5 target companies within favored industries
- Eliminated 80% of the manual checks in the analysis which reduced the processing time by 2-3 hours and decreased SLA breaches for client reporting by 15%
- Analyzed monthly and quarterly results of 15 – 20 competitors and suggested policies that could improve revenue by 10%

Credit Analyst, Chase – Ontario, CA **December 2015 - December 2017**

- Analyzed credit applications and made credit recommendations that resulted into use of \$20K monthly spending which was 15% below the forecasted budget
- Helped about 25 customers achieve their financial goals through investigation of credit and loan analysis
- Executed use of new technology (SharePoint Portal) and processes to facilitate monthly reporting that decreased reporting cycle by over 40%
- Implemented activities focused on solving business issues and enhanced the company's competitive advantage through developing strategic alliances with other Chase entities

Investment Intern, BAE Financial Services – Orange, CA **July 2014 - December 2014**

- Developed and implemented financial plans for individuals, businesses, and organizations by utilizing knowledge of tax and investment strategies, securities, insurance, and pension plans
- Prepared and submitted documents to implement financial plan selected by client, and maintained contact to revise plan based on modified needs or changes in investment market
- Prospected for new client relationships through referrals from existing clients, frequently gained more than 10 referrals during the initial face to face interviews

EDUCATION

Master of Business Administration, Finance **May 2018**

San Francisco State University, San Francisco, California (Cum. GPA: 3.92)

Relevant Coursework: Financial Management, Financial Statement Analysis, Investments

Bachelor of Science, Business Administration & Management **May 2016**

California State University, Fresno, California (Cum. GPA: 3.85)

SKILLS

Computer: Bloomberg, Excel, Access, PowerPoint, Word, SQL, C++

Languages: English, Fluent in Mandarin

AFFILIATIONS

Founder & President, MBA Association, San Francisco State University **January 2017 - Present**

- Facilitate weekly group meetings and monthly networking functions
- Recruit new members through classroom presentations and social events on campus