Cen Wang wangcenn@live.ca **905-348-2226**

QUALIFICATIONS:

- 2+ years experience in engaging clients and providing financial advisory services to clients
- 5 years of personal investment experience in stocks, ETFs and mutual funds
- 1-year work experience in digital marketing, digital content management in a major Canadian retailer
- 3 years retail sales experience in well-known North America luxury retailers
- Solid knowledge of financial products such as equity, fixed income, mutual funds, foreign exchange, ETFs
- Advanced Excel skills with hands on experience on financial modeling, financial analysis and financial reporting
- Well-rounded problem solving, customer service and communication skills (verbal and writing), detail-oriented, be able to communicate with people from diversified background

EDUCATION & PROFESSIONAL DEVELOPMENT:

CFA Level 3 Candidate & FRM all levels passed
Master of Finance, Smith School of Business, Queen's University 2021.06-2022.06
Honors Bachelor of Business Administration, Brock University 2008.09-2013.06
Business International Exchange Program, Rouen Business School, Rouen, France 2012.01-2012.06
Professional Sales Certificate, Canadian Professional Sales Association, Toronto, Canada 2013.06

WORKING EXPERIENCE:

Consultant, *Oriental Overseas Consulting Ltd, Toronto* 2020.06-Current

- Assisting client's investment goal by researching the best practices and analyzing investors' parameters (e.g. financial objectives, risk tolerance, liquidity needs, time horizon, taxation/legal constraints)
- Reviewing financial reports, conducting market research and performing SWOT analysis to customize and promote new services to target clients
- Providing advisory support for the business development and planning company new business initiative

Financial Advisor, *China Guangfa Bank*, *Qingdao, China* 2018.01-2019.02

- Maintain a deep understanding of relevant financial products and services available in order to deliver trusted investment advice and retain business, and maintain an up-to-date knowledge of Business Banking products, processes, and relevant legal, regulatory and technology requirements
- Building and growing clients' portfolio through excellent client services, exceptional financial service support and dedicated relationship management, and acting as a strategic partner to customers by sharing industry trends to better leverage our product and identify new improvements or functionalities
- Manage risk and minimize losses through effective portfolio management, monitoring and control

Sales Associate, Designer Handbags, *Nordstrom Toronto Eaton Centre, Toronto* 2016.08-2017.05

- Achieved excellent sales volumes by becoming the #1 in sales storewide and top salesperson in the department
- Prepared for the grand opening of Nordstrom Flagship store in Toronto by working closely with the department manager, participating in various store events, and acquiring sufficient training on selling and merchandising
- Build relationship with customers by to customers' individual needs, contacting customers to follow up on purchases, inviting them to upcoming events

Category Specialist, Content Operations, *Sears Canada, Corporate office, Toronto* 2014.02-2014.08

- Use web content management platform to manage content for various product line, and execute the product content creation process by validating and enriching item data information coming from the business team and vendors
- Identify operational issues, system fails, or misinformation on product pages; troubleshoot and correct content concerns to eliminate the potential false claims. Perform website content quality assurance regularly and drive product content standards for existing online items
- Work closely with merchant teams and vendors to coach them through the E-Commerce product creation process. Provide vendors with content creation direction and follow-up to ensure on time execution

Buying Coordinator, *Sears Canada, Corporate Offices, Toronto* 2013.10-2014.02

- Prepare new items launches. Ensure accurate, timely and complete item set-up and Complete online volume estimates
- Communicate with buyers, vendors, marketing coordinators, and category managers to resolve issues to ensure the accuracy of online items set up
- Generate purchase orders for online items, maintain inventory of non-replenishment items, and make sure orders are placed correctly in a timely manner. Responsible for order changes that may prompt by buyers or vendors

References Available upon Request