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## EDUCATION

- University of California, Irvine, Irvine, CA** **06/2009**  
*Master of Business Administration, Finance*
- GMAT 720
- National Chengchi University, Taipei, Taiwan** **06/2005**  
*Bachelor of Arts, Economics*
- Student Ambassador
  - Vice President, Yen-Ping High School Alumni Club

## EXPERIENCE

- Merrill Lynch**  
**Private Banking and Investment Group, Irvine, CA** **07/2008 – 08/2008**  
*Finance Intern*
- Prepared quarterly reviews of portfolios for clients including fixed income analysis, accelerated return note analysis, education funding plans and nonqualified deferred compensation plans.
  - Conducted company specific research through Bloomberg to help business development projects.
- Graduate Institute of Finance** **02/2006 – 06/2007**  
**Fu Jen Catholic University, Taipei County, Taiwan**  
*Researcher*
- Conducted research on the succession of family firms in Asia, focusing on corporate governance
- Conducted research on financial statements and collected data of 100 family firms in Taiwan and analyzed the structure of corporate ownership to see how much percentage of the stock shares family members controlled and how many seats they had on board.
  - Confirmed the key variables that affected the performance of succession through case studies to set up research model. These variables included background and education of successor, the number of family members on board of directors, and the reaction of stock prices to the succession etc.
  - Identified and calculated what and how much the variables influenced the succession and ownership of the family firms. We found out that the public had more positive perspectives toward family firms that hired independent managers as successors than those that hired family members. The public's concern was revealed through the fluctuation of stock prices.
- Chinatrust Commercial Bank, Taipei, Taiwan** **09/2005 – 12/2005**  
*Personal Banker*
- Offered clients wealth management services and information about their portfolio performance
- Introduced and sold financial products: funds, insurance and structured notes etc. to our depositors about \$60,000.
  - Provided clients with latest financial information by phone, email or in person and introduced financial products based on their risk preference.
  - Reviewed the portfolios of clients and informed them of any big change in assets, which made clients able to react to it timely such as switching to another financial investment to diversify the portfolio.
  - Reported the overall performance of portfolios to the clients monthly to keep them updated with the status quo of portfolios.
- Foreign Language Center, National Chengchi University, Taipei, Taiwan** **09/2003 - 06/2005**  
*Teaching Assistant*
- Assisted professor and students to prepare for English classes
- Prepared teaching materials for classes.
  - Corrected assignment and graded test sheets.
  - Assisted students with academic problems to let them get familiar with the course.