

# XIAOLIN ZHAO

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## Professional Summary

Experienced finance professional with over 10 years as a financial analyst, PR strategist, and educator. Proven in crafting branding strategies that elevate visibility and reputation for financial institutions. Passionate about leveraging creativity and client focus to drive positive industry change.

## Skills

- Investment Analysis
- Research and Data Analysis
- Strategic Communication
- AI Tools: ChatGPT, Perplexity AI, NotebookLM, Napkin AI, MidJourney, Suno AI, ElevenLabs
- Project Planning & Management
- Advanced MS Office Suite
- Python/SPSS/STATA/SAS Software

## Work History

### Financial Analyst & Media Operations Manager

04/2021 to 06/2023

Yingmi Fund – Beijing, China

- Conducted comprehensive analysis of economic and market trends, earnings potential, financial statements, and diverse indicators to formulate appropriate investment strategies.
- Managed a team of investment analysts in the creation of Fund of Funds (FOFs) targeting investments in China's stock markets (Shanghai, Shenzhen, Hong Kong) and U.S. stock market, resulting in assets under management (AUM) reaching \$200 million in 2022.
- Guided team in content creation and strategic management of APP and social media platforms, yielding 111,000 APP Prime members and 1 million social media followers by 2022.
- Collaborated with the product development department to facilitate the design and launch of cutting-edge App features, including personalized asset allocation plans and an Artificial Intelligence-powered Chatbot.

### Finance Educator

11/2019 to 04/2021

Golden Education Global – Beijing, China

- Authored and published CFA and FRM curriculum, using extensive knowledge of finance, classroom dynamics, and effective learning approaches.
- Developed online learning systems and crafted comprehensive online courses, including videos, assignments, study guides, and practice tests.

- Instructed CFA Level I, II and III.
- Conducted needs analysis to define project scopes aligned with business needs.

## **Financial Advisor**

**10/2018 to 10/2019**

### **Marcum LLP – Beijing, China**

- Conducted audits of publicly traded Chinese companies listed on U.S. exchanges to ensure compliance with regulatory requirements and financial transparency.
- Performed audits of U.S. companies with operations in China, evaluating financial statements, internal controls, and operational efficiency to identify potential risks and opportunities.
- Executed M&A due diligence processes for both investors and companies, assessing financial, operational, and legal aspects to support informed investment decisions and successful acquisitions.

## **Risk Management Specialist**

**09/2015 to 09/2018**

### **Bank of China (Macau) – Macau, China**

- Performed due diligence on clients, verifying identities and monitoring cross-border commerce to assess risks of illegal intent.
- Generated risk management reports, covering Anti-Money Laundering (AML), Combating the Financing of Terrorism (CFT), and Know-Your-Customer (KYC).
- Developed and delivered risk management training programs, with a focus on moral hazard prevention and improving AML and KYC skills.

## **Education**

**Master of Arts: Public Relations and Advertising**

**09/2023 to Present**

**University of Southern California - Los Angeles, CA**

**Master of Science: Global Finance**

**09/2013 to 02/2015**

**Fordham University - New York, NY**

**Bachelor of Science: Economics-Finance (National Ranking 1)**

**09/2009 to 07/2013**

**Renmin University of China - Beijing, China**

**Languages:** Mandarin (Native), English (Full Professional), Cantonese (Full Professional)

## **Certifications**

- CFA (Chartered Financial Analyst)
- Certified FRM (Financial Risk Manager)
- Securities Qualification Certificate
- Fund Qualification Certificate
- National Teacher Certificate (Finance)