Chunzao (Lisa) Wan

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EDUCATION

The University of Texas at Austin ⟶ Austin, TX
Bachelor of Science in Economics, GPA: 3.3/4.0, GRE: 331 ⟶ Jun 2025 (Expected)
- **Involvement**: lab assistant at the Critical Data Studies Lab, fundraiser for Chinese Undergraduate Student Association
- **Relevant Courses**: Intro to Econometrics, Micro Economic Theory, Economics Statistics, Principles of Financial Accounting
- **Certification**: Udemy Master at Python OOP

INTERNSHIP

Ivy Academy LLC ⟶ Los Angeles, CA
Accounting & Research Analyst Intern ⟶ Jul 2025 – Aug 2025
- Analyzed macroeconomic and geopolitical trends, completed daily market summaries and communicated key talking points with Chief Investment Officer.
- Implemented both portfolio management and risk management systems on behalf of select family office clients. Coordinated with external vendors, negotiated terms, and oversaw the customization process based on client portfolio needs and preferences.
- Improved system for sorting and ranking incoming investment pitches and client account statements. Assisted to screen prospective investments, develop preliminary due diligence reports, and solicit client interest.
- Developed cash flow waterfall models for private equity and venture capital investments, including capital calls and distributions.

KPMG International Ltd. ⟶ Beijing, China
Audit Intern ⟶ Jul 2024 – Aug 2024
- Assisted associates in preparing quarterly financial statements for two digital media and advertising & marketing companies (51World, Lesi), researched relevant industry trends, competitors' performances, checked data validity and highlighted and reported suspicious data for review with the clients.
- Adopted Python, Stata, and Excel to clean and process 28,000+ data records whenever needed.

Dentons Law Offices ⟶ Anhui, China
Legal Assistant Intern ⟶ Jun 2023 – Aug 2023
- Provided legal consulting services on restructuring, pre-listing tutoring, data compliance, and VIE listing for clients.
- Assisted multiple private equity fund clients in debt recovery through effective communication and justification with presiding judges and successfully helped clients secure legal rights and financial recoveries from defaulting debtors.

PROJECTS

SIM Card Archive
Worked with a team of 4 students to enhance the Optical Character Recognition (OCR) technology. By using machine learning algorithms, we developed a customized model to distinguish different layers of text and orientations on SIM cards' surface. We then transformed the extracted text into a structured, machine-readable format by employing data extraction techniques. This led to our proposal of a new SIM Card model that enhances metadata workflows, and supports open data efforts. We published our milestone progress at iSchool AI Showcase on Nov.8th.

Risk Management
Teamed with 5 students to assess the risk management strategy for a retail firm. We started from analyzing the historical risk data, identified the most vulnerable areas, such as supply chain disruptions and cybersecurity threats, and then adopted a combination of assessment techniques, such as Monte Carlo simulations. After we developed the mitigation strategies, we presented our final recommendation, including a cyber insurance policy, a strengthened supplier relationship to reduce supply chain volatility, and enhanced internal control through training programs, to promote long-term stability with an estimated 26% increase in revenue.

SKILLS

Technical: MS Office Suite (Word, Excel, PowerPoint), Tableau, Python, SQL, STATA, Workday
Language: English, Chinese, Spanish