

Shulu (Shay) Wang

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Personal Banker at TD who is fluent in Mandarin and English and can communicate in French. Graduated from Carleton University with high honors in Bachelor of International Business, concentration in finance and minor in French. Completed the Canadian Security Course, Wealth Management Essential and Financial Planning Supplement and Advanced Investment Strategies.

Work Experiences

Financial Advisor/Personal Banker

TD, Ottawa

Mar 2022–Present

- Analyzing applicants' financial status, credit, and property evaluations to determine the feasibility of credit granting
- Helping clients achieve their financial goals by creating investment plans
- Advising clients on asset allocation and location to generate the best after-tax result

Financial Service Representative

CIBC, Ottawa

Sept 2021–Mar 2022

- Demonstrated excellent product knowledge in cash management, lending, investment and wealth protection, created on average 25 solutions each week
- Proactively reach out to over 30 existing and new clients on a weekly basis to identify financial gaps and offer appropriate solutions;
- Consistently over-achieving sales targets by actively identifying and creating opportunities to cross-sell/up-sell.

Customer Service Representative

CIBC, Ottawa

March 2021–Aug 2021

- Interacted with over 100 clients per day, helping them with their everyday banking needs;
- Worked as part of a team to ensure clients are receiving proper advice and introduced to the right colleague
- Helped clients to gain knowledge on various products offered that could improve their financial situations.

Education

Carleton University

Ottawa, ON

Sept 2017-Dec 2020

Bachelor of International Business with **Concentration** in Global Financial Management and **Minor** in French

- Ranked top 5% of the class with CGPA of 11.1/12;
- Studied intensive French for mandatory study year abroad at Université Paris Dauphine, Paris, France;
- -McIrvine Scholarship (\$12,000 in 4 years) & Sprott Exchange Travel Scholarship (\$1,500) Recipient.

Mennonite Educational Institute

Abbotsford, BC

Sept 2014-June 2017

- International Student Academic Achievement Award (\$1,000)

Achievements

- 2020 **Bank of Canada's Governor's Challenge** finalists, competed in teams of 4 representing Carleton
- Golden Key International Society Member
- Dean's List Honoree: 2018-2019, 2019-2020 & 2020-2021

Certifications

- Completed AIS on Nov 24th, 2022
- Completed FPSU on July 11th, 2022
- Completed WME on Jan 7th, 2022
- Obtained CSC on March 2nd, 2021
- Bloomberg Market Concepts Certification, 26th February, 2019.

Work Experiences Cont'd

Marketing Manager & Bubble Tea Barista

Y-Not Go For Tea, Ottawa July 2020 – Aug 2021

- Created and released social media promotions for the small local business via WeChat and Instagram, increased monthly sales by 48%;
- Administered Uber platform realizing up to 1500 quarterly orders and maintaining the title of Top Restaurant (4.8+/5 rating);
- Hired and trained two new employees who currently work there.

Freelance Consultant

Vorwerk Canada LTD., Ottawa April 2020 – Aug 2021

- Promoted high-end 20+ functions in one high-tech appliance from Germany to Canadian and Chinese end-users; units valued at \$2,099CAD each;
- Sold 18 units in the span of 16 months and reached over 50 potential buyers;
- Marketed the product Thermomix TM6 via online conferences and conducted cooking experiences upon request.

Entrepreneur

SZ Zongheng Wine LLC., China September 2019 – March 2021

- Developed strategies for building income, including distribution model and customer acquisition, maintaining contact with 361 previous BtoB and BtoC consumers;
- Managed sales and marketing in Northern China for Wine imported from France and Spain with 500 bottles/month on average personal sales.

Student Recruiter & Representative

Lion Education International, Ottawa August 2018 – September 2020

- Recruited 23 students interested in taking summer school with professors from American Universities in China;
- Generated significant interest from not only Chinese international students studying abroad, but also non-Chinese students who are interested in living in China for one-month while earning academic credit; remain in contact with 93 of them till today.

Skills

- Language: Proficient in Mandarin and English, intermediate French;
- Proficient in MS Word, Excel & PowerPoint;
- Strong Leadership: Volunteer organizer at the Carleton Language Learning Resource Center;
- Effective Problem Solving: Creating on spot solutions for consumers when promoting \$2099 Thermomix;
- Excellent Customer service: demonstrated through bubble tea barista in busy bubble tea shop;
- Marketing and sales expertise with online wine promotion and distribution;