

## EDUCATION

### FORDHAM UNIVERSITY, GABELLI SCHOOL OF BUSINESS

New York, NY

#### M.S. in Finance, Expected December 2026

September 2025 - Present

- Honors: Dean's Scholarship Recipient

### NEW YORK UNIVERSITY

New York, NY

#### B.S. in Business & Finance

September 2021 - May 2025

- Honors: Dean's Honors List (2024-2025), Leadership Position: Project Manager - TAMID Group

## WORK EXPERIENCE

### INCEPTION HOLDINGS

New York, NY

#### Summer Analyst

July 2025 - September 2025

*Global investment and advisory platform, focused on valuation and strategic financial analysis*

- Evaluated \$4.4B IPO filings and PRC regulatory disclosures, surfacing 5+ material risk factors affecting investor decisions
- Engineered damages valuation models (DCF, comps), estimating \$1.2B shareholder losses tied to cybersecurity probes
- Generated sensitivity analyses and 10+ valuation exhibits underpinning federal securities claims and expert testimony

### FORGE HUMANOID

Hong Kong SAR

#### Strategic Finance Analyst Intern

May 2025 - August 2025

*Robotics startup pioneering humanoid robots for global service and industrial applications*

- Drove investor outreach to 90+ VCs, built trust with 3 China-based VCs by leading investor calls in Mandarin and structured tailored SAFE agreements and pitch materials
- Designed dynamic financial models (P&L, burn/runway, cap table) and investor dashboards, securing 2 investor term sheets by tailoring pitch materials to highlight upside and fit
- Directed an 8-person team to standardize data collection, increasing investor pipeline accuracy + expediting due diligence

### AAVA GROUP

Hong Kong SAR

#### Financial Analyst Intern

January 2025 - April 2025

*Boutique investment advisory firm providing cross-border venture financing and strategic growth consulting for startups*

- Executed buy-side due diligence and valuation analyses (DCF, comparables) for a \$12M Series A, informing funding decisions
- Drafted term sheet scenarios for a cleantech energy company, optimizing deal structures for investor terms and funding
- Secured early commitments from 3+ investors by integrating direct VC feedback into a refined funding strategy and deck

### JOINT-WIN PARTNERS

Shanghai, China

#### Capital Markets Analyst Intern

September 2024 - December 2024

*Top-tier Shanghai corporate advisory and law firm, renowned for high-profile cross-border capital markets deals*

- Built cross-border capital-structure models to support a \$15M OTC raise; presented recommendations to senior leadership
- Led U.S. outreach and multi-jurisdictional financial/regulatory diligence across 4 states to support a major factory acquisition for a top-5 global solar cell manufacturer

### PREMIUM MERCHANT FUNDING

New York, NY

#### Business Development Intern

May 2024 - July 2024

*Private credit and specialty-finance firm delivering working-capital and mezzanine financing to small business borrowers*

- Overhauled a \$5M underwriting scorecard, refined credit limits and advance rates to cut default risk and sharpen capital use
- Reworked advance terms and repayment structures across 10+ deals, accelerating approvals and lifting blended yield

## ADDITIONAL

- Certifications: Wall Street Prep: Financial and Valuation Modeling, AI for Business and Finance (Columbia Business School)
- Technical Skills: Python, Excel (Pivot Tables, VLOOKUP), SQL, PowerPoint, Tableau, FactSet, PitchBook
- Languages: Mandarin (professional working proficiency)
- Interests: Marathon running, and aerial photography (FAA Part 107 certified)