

# 李卓达

15840060092 | 649643382@qq.com

辽宁省沈阳市浑南区浑南中路

1998-05 | 男 | 183 | 汉族



## 个人总结

- 教育背景**：美国加利福尼亚大学经济学本科，具有扎实的金融与财务建模专业理论知识基础，培养了很好的数据分析与逻辑思考能力；2022年获得“荣誉毕业生”称号；
- 实践经历**：通过丰富的社会实践及校园经历，积累了扎实的活动组织、运营支持、项目支持、业务开发、组织策划及沟通协调等方面的经验与技能；多年的志愿者活动，锻炼了较强的团队合作能力；
- 综合技能**：美国留学7年，英语可作为办公语言；熟练使用 Word、PPT、Excel 等办公软件，熟练使用 iMovie、Final cut pro 等视频剪辑软件；具备良好的数据分析能力；
- 个人优势**：性格沉稳、为人真诚，具有较强的沟通协调能力；擅长于处理学习和生活中遇到的各类棘手问题，喜欢学习和善于接收新事物；去过十多个不同的国家，具有广阔的视野和创新思维，能迅速地适应新环境并融入其中；

## 教育经历

### 加利福尼亚大学圣地亚哥分校 - 经济学 本科

2020年09月 - 2022年03月

- GPA : 3.6/4.0
- 相关课程：公共经济学、环境经济学、统计学、国际经济学、财政学、发展经济学、企业管理、市场营销、国际金融等；
- 所获荣誉：荣誉毕业生（2022年）

### 圣塔芭芭拉社区大学 - 经济学 本科

2018年09月 - 2020年06月

- GPA: 3.95/4.0
- 相关课程：公共演讲、统计学、心理学、韩语、微积分、社会研究、国际商务等；
- 所获荣誉：荣誉毕业生（2020年）

## 工作与实习经历

### Integral Financial (美国旧金山总部) - 财务顾问助理

2022年08月 - 2024年02月

- 协助承销由美国花旗银行，法国兴业银行，加拿大蒙特利尔银行，摩根大通等银行发行的结构性债券。
- 协助完成日常的行政工作。根据客人要求，为客人提供最优的解决方案。

### 萨芭妮娜鞋业公司 - 销售

2018年06月 - 2018年08月

- 销售目标：在销售主管的指导下，执行个人销售目标和具体工作计划，保质保量完成每月既定销售任务；在职期间每月个人销售额超3万元；
- 营销策略：根据公司产品特征并结合公司在商业街区所处位置，制定具体的营销策略，包括市场环境分析和促销政策制定等
- 销售动作：对于到店客户积极主动沟通，挖掘客户需求与消费喜好倾向，为不同年龄段消费者选择不同的款式；

## 工作以外经历

### 美国旧金山志愿者活动 - 志愿者

2019年03月 - 2019年04月

- 需求调研：了解旧金山当地流浪者的生活需求，共计走访调查了超100名；
- 收集整理：通过举办义卖活动、自愿捐赠等方式收集并整理二手服饰、家具等生活用品；并将用品进行清洁、分类整理；
- 销售工作：将收集整理好的生活用品，运输至校园进行集中销售，共计售卖获得超过2万美元，全部用于捐赠款项；

### 肯尼亚志愿者活动 - 组织活动志愿者

2017年03月 - 2017年04月

- 统筹规划：负责组织学校举办的肯尼亚志愿者活动，计划活动日程安排，组织好人员分工；
- 活动策划：做好募捐活动的方案策划工作，具体包括募捐海报设计、募捐内容、以及募捐活动的落地实施；
- 公益支持：将募捐活动获得的募捐款超过5万美元，全部用购买生活学习物资，并将这些物资有效地分派给当地学生和居民；帮助当地学生建造课桌和书柜；辅导教育当地学生课业内容；

## 其他

- 技能**：熟练操作 Word、Excel、PPT 等办公软件；熟练使用 iMovie、Final cut pro 等视频剪辑软件；
- 语言**：英语（听说读写流利）；

# Zhuoda Li

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## SUMMARY

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- **Academic Background:** Bachelor's degree in Economics from the University of California, with solid theoretical knowledge of finance and financial modeling, with good ability of data analysis and logical thinking; awarded "Honorary Graduate" in 2022
- **Practical Experience:** through rich social practice and campus experience, accumulated solid experience and skills in event organization, operation support, project support, business development, organization planning, communication and coordination; through years of volunteer activities, developed strong teamwork skills
- **Comprehensive Skills:** studied in the United States for 7 years, able to use English as the working language; skilled in Office software such as Word, Powerpoint, Excel, etc., proficient in video editing software such as iMovie, Final Cut Pro, etc.; good data analysis skills
- **Personal Strengths:** calm and sincere, strong communication and coordination skills; good at dealing with all kinds of difficult problems encountered in study and life, willing to learn and good at receiving new things; traveled to more than ten countries, with a broad vision and innovative thinking, able to quickly adapt to and integrate the new environment

## EDUCATION

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**University of California, San Diego** Sep 2020 - Mar 2022  
Economics Bachelor San Diego

- GPA: 3.6/4.0
- Core Courses: Public Economics, Environmental Economics, Microeconomics, Macroeconomics, Econometrics, International Economics, Development Economics, Economics of Ocean Resources etc.
- Honors: Honorary Graduate (2022)

**Santa Barbara City College** Sep 2018 - Jun 2020  
Economics Bachelor Santa Barbara

- GPA: 3.95/4.0
- Core Courses: Public Speaking, Statistics, Psychology, Korean, Calculus, Social Studies, International Business, etc.
- Honors: Honorary Graduate (2020)

## WORK EXPERIENCE

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**Integral Financial (Headquarters in San Francisco)** Aug 2022 - Feb 2024  
Financial Advisor Assistant San Francisco

- Assist in underwriting structured bonds issued by Citibank of the United States, Societe Generale of France, Bank of Montreal of Canada, JPMorgan Chase and other banks.
- Assist in daily administrative work. Provide guests with the best solutions according to their requirements.

**Sabanina Shoe Company** Jun 2018 - Aug 2018  
Salesman

- Sales Target: under the guidance of the sales supervisor, implemented personal sales targets and specific work plans and completed the monthly established sales tasks with quality and quantity; reached over 30,000 RMB of personal sales per month during the in-service period
- Marketing Strategy: according to the company's product characteristics and combined with the company's location in the commercial district, formulated the development of specific marketing strategies, including market environment analysis and promotional policy development, etc.
- Sales Practices: actively communicated with customers in-store, explored needs and preferences, and selected different styles for different age groups

## VOLUNTEER EXPERIENCE

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**Volunteering in San Francisco** Mar 2019 - Apr 2019  
Volunteer San Francisco

- Needs Research: understood the needs of local homeless people in San Francisco, visit and surveyed over 100 people in total
- Collection and Organization: collected and organized used clothing, furniture, and other household items by holding charity sales and voluntary donations; cleaned and sorted the items
- Sales: transported the collected and organized household goods to the campus for centralized sales, sold over \$20,000, all of which were used for donations

**Volunteering in Kenya** Mar 2017 - Apr 2017  
Volunteer Kenya

- Coordination and Planning: responsible for organizing volunteer activities in Kenya held by the university, planning the schedule of activities, and organizing the division of human resources
- Activity Planning: conducted the planning of the fundraising activities, including the design of fundraising posters, fundraising content, and implemented the activities
- Public Service: purchased living and learning materials and distributed them to local students and residents using the funds from the donors of over \$50,000; helped local students build desks and bookcases; tutored and educated local students on the schoolwork

## OTHER INFORMATION

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- **Skills:** proficient in Word, Excel, Powerpoint, and other Office software; proficient in iMovie, Final Cut Pro, and other Video editing software.
- **Languages:** English (fluent), Chinese(Native)