

Zachary “Ziggy” Lee

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EDUCATION

Lehigh University

Bachelor of Science in Business and Economics

Bethlehem, PA

Major: Finance, Minor: Computer Science

SKILLS AND COURSES

Software: Excel (advanced), Python (intermediate), SQL (intermediate), R (intermediate), Java (intermediate), VBA (intermediate), Geneva (intermediate), Heap (intermediate)

Relevant Courses: Data Science for Finance, Advanced Financial Modeling, Startup and Venture Capital Finance, Derivatives and Risk Management, Investments, Corporate Finance, Object Oriented Programming, Data Science, Web Systems Programming, Survey of Artificial Intelligence, Business Information Systems, Financial and Managerial Accounting

PROFESSIONAL EXPERIENCE

Operations Analyst – Syndicated Loans Desk, SEI Investments Company, Oaks, PA

July 2024 - Present

- Perform daily and monthly position and accrual reconciliations for a client managing over \$40B AUM
- Execute credit event processing within Geneva, leveraging information from the S&P Global Suite
- Admin for 4,500+ positions across hundreds of portfolios, ensuring accurate tracking, reconciliation, and reporting
- Developed Excel macros to streamline workflows, increasing efficiency in the completion of client month-end reconciliation
- Maintain constant communication with the client to quickly resolve discrepancies and ensure timely resolution
- Completed comprehensive training in alternative investments, fund accounting, and bank debt among other technical skills

Analyst, Alchemy Capital Partners LLC, New York, NY (Remote)

June 2023 - April 2024

- Private Equity fund specializing in residential services consolidations and recession-resistant strategies
- Prospected small to medium-sized businesses as part of the initial due diligence and acquisition process
- Conducted detailed industry studies to identify untapped prospective investments leading to strategic portfolio diversification
- Completed courses in financial modeling and Microsoft Office Suite, with a focus on best practices

Research Assistant, Lehigh University, Bethlehem, PA

December 2022 - June 2023

- Conducted research under Prof. Jesus Salas on the impact of corporate director replacements on firm value
- Compiled and analyzed more than 1,000 corporate director replacement cases sourced from 8-K and DEF 14A filings

Data Analytics Intern, OneMain Financial – Brightway, Charlotte, NC

June 2022 - August 2022

- Integrated Heap for Website, iOS, and Android apps, unlocking actionable user behavior insights
- Created advanced SQL queries and Excel formulas to profile user behavior for the pre-application process
- Utilized SQL data analysis to pinpoint user confusion, saving customer support costs through application enhancements
- Increased conversion rate from 89% to 93% of online applicants through the implementation of streamlined processes
- Presented to C-Suite executives on pre-approval application sticking points and their fixes to boost client conversion rates

Sales Intern, Millennium Advisors LLC, Charlotte, NC

May 2021 - August 2021

- Tasked with CRM, platform enablements, producing growth opportunity assessments, and assisting with EoQ reports
 - Assisted traders with liquidity and pricing research on tickers using SQL, Bloomberg, MarketAxess, and TradeWeb
 - Learned about market-making, risk management techniques, and fixed-income asset types by shadowing traders
 - Presented to C-Suite and traders on improvements to proprietary software and their interaction with databases
 - Completed a week-long Python intensive led by quantitative analysts focusing on financial analysis
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Interests: Premier League Soccer, Formula 1, Chess, Golf, Poker, Cooking