

# MISSY MBA

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## Professional Profile

- Experience in investment and mutual funds in the financial services industry.
- Managed and facilitated the implementation processes of financial planning.
- Brought in over \$80 million dollars in assets
- Excellent client engagement, written, verbal communications, organizational, and leadership skills.

## Education

Master of Business Administration, Expected August 2006  
The Pennsylvania State University, Middletown, PA

Bachelor of Science in Finance and International Business, May 2004  
The Pennsylvania State University, Smeal College of Business, University Park, PA

Singapore Study Abroad, National University of Singapore, Spring 2003

## Professional Experience

THE VANGUARD GROUP, Malvern, PA

**Financial Associate**, Financial Planning, 2004 to present

- Manage and facilitate straight through plan implementation exchange process
- Manage and support asset consolidation bringing over \$80 million in assets
- Maintain productive working relationships with planners and clients on a daily basis

**Intern**, Fund Financial Services, 2003

- Learned the fundamentals on the valuation methodologies for mutual fund accounting
- Gained experience on international market exchanges and practices, currency valuation and domestic market valuations for securities held in the fund
- Expanded understanding in the use of vendor pricing terminals and the significance of security price fluctuations to the fund's NAV

**Intern**, Internal Audit, Institutional Division, 2002

- Established knowledge with Internal Audit's procedures and processes
- Tested specific transactions to ensure controls are in place of the SAS70 report
- Completed work on scheduled risk-based audit, flowcharting of workflows

MORGAN STANLEY, Conshohocken, PA

**Intern**, Certified Financial Planner, 2003

- Received valuable experience under the direction of an Associate Vice President in the capacity of marketing and investment research

## Leadership Positions

The Vanguard Group

Corporate Internship Program 2003, Team Leader

- Led intern project team in developing a research project and presentation to senior management team

The Pennsylvania State University Financial Management Association, 2001-2004  
Vice President / Board Member / Treasurer

- Served as liaison between Professional organizations and students
- Contacted Vice Presidents and Managers of companies for recruiting activities

Penn State KEWL (Knowledge, Excellence, Wisdom, Learning), 2002-2004  
Mentor

- Assisted first year students in their adjustment from high school
- Developed leadership through course credit

Sigma Omicron Pi, Asian American Interest Sorority, Penn State University, 2001-2004  
Pledge Class Treasurer / Fundraising Chair / Recruitment Chair / House Treasurer

- Managed sorority's checkbook
- Organized sisterhood events to raise money for the house
- Planned activities and meetings for girls with interest in our sorority

### **Computer Skills**

- Word Processing: Microsoft Word
- Spreadsheet/DataBase: Microsoft Excel, Lotus 1-2-3
- Internet Tools: Netscape Navigator, Internet Explorer
- Operating Systems: Windows 95/98
- E-Mail Systems: Lotus Notes, Microsoft Outlook
- Programs: Microsoft Office, Visio, Eudora, Minitab, Visual Basics, Bloomberg, Reuters, InvestOne, Dreamweaver, Basic HTML

### **Languages:**

- Fluency in Mandarin and Cantonese
- Conversational Spanish

### **Interests:**

- Recruiting recent college graduates
- Organizing diversity events

**References available on request**