

Chi Long (Jester) Shum

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EDUCATION

University of Washington, Michael G. Foster School of Business

B.A. in Business Administration, Finance and Information Systems | Minor: Informatics

Seattle, WA

Expected: June 2027

Cumulative GPA: 3.6/4.0

Relevant Coursework: Corporate Finance, Financial and Managerial Accounting, Data Analytics, Database Management

PROFESSIONAL EXPERIENCE

LALC Capital - 50+ analyst equity research platform

Seattle, WA

Junior Equity Analyst

March 2026 – May 2026

- Researched 3 micro-cap consumer companies using DCF analysis and Claude to speed up filing reviews, presenting an investment recommendation and incorporating mentor feedback
- Analyzed 10-K filings and conducted market and competitor research under mentor guidance, building skills in financial statement analysis, revenue and margin trends, and valuation

City of Seattle

Seattle, WA

Accounting Intern

June 2025 – August 2025

- Tracked program funding through 5+ weekly budget-vs-actual reports in Excel (PivotTables, VLOOKUP), improving the reporting process with templates that saved time by 15%
- Evaluated weekly expenses and processed 150+ vendor invoices in QuickBooks through systematic expense coding and cross-department coordination, maintaining a 98% on-time payment rate

UW Foster School of Business

Seattle, WA

Student Consultant

January 2025 – March 2025

- Constructed a cost-benefit analysis of a Seattle-based facility services business's 3 service lines and recommended focusing on its highest-margin sector, projecting ~\$60K in cost reduction opportunities
- Led a cross-functional team of 5 in competitive analysis across 10+ firms, identifying operational performance gaps and building a strategic roadmap presented to the client's leadership team

PERSONAL PROJECTS

Microsoft Segment Financial Analysis & Reporting Automation - Power BI, Excel, SQL, Python, GenAI

- Built a 3-year segment P&L analysis (FY2023–FY2025) across 3 reporting segments, identifying operating leverage as FY2025 operating income grew 17% YoY against 15% revenue growth
- Performed variance analysis on Intelligent Cloud, where cost of revenue grew 36% vs. 21% revenue growth, pinpointing cloud infrastructure costs as the main source of margin pressure on profitability
- Developed Power BI dashboards, SQL queries, and Python validation checks to track 10+ financial metrics, reconcile reported figures, and automate recurring reporting

Expedia Multi-Stay Hotel Booking Feature – Capital Investment & Scenario Modeling

- Built a 3-year discounted cashflow (NPV) model from Expedia 10-K data showing a multi-stay feature lost \$86M under a 50/50 discount split; recommended launch only if hotels fund over 2/3

LEADERSHIP EXPERIENCE

University of Washington Hedge Fund Group | Director of Education

October 2025 – Present

- Facilitate 6+ structured workshops on alternative investment strategies, synthesizing complex financial concepts into accessible curricula, driving ~25% increase in member engagement
- Organize and execute the club's stock pitch and trading case competition, managing end-to-end logistics and coordinating participation across 40+ members

Washington Superbike Team | Business Team – Outreach Lead

December 2024 – June 2025

- Secured \$1,000+ in corporate sponsorships from Celsius and Altium and drove 3x expansion in the outreach pipeline by leading 10+ sponsor meetings with corporate stakeholders
- Coordinated across 3 cross-functional sub-teams (mechanical, electrical, marketing) to translate sponsor requirements into actionable project milestones, ensuring alignment between stakeholders and delivery

ADDITIONAL INFORMATION

Technical Skills: Excel (xlookup, VBA), PowerPoint, SQL (MySQL), Power BI, Python, R, Tableau

AI Skills: Claude, ChatGPT, Lovable, Prompt Engineering, Workflow Automation, AI-Assisted Data Analysis

Languages: English (Fluent), Cantonese (Native), Mandarin (Fluent), Japanese (N4)

Interests: Duolingo (1300+ Streaks on Japanese), Tennis, Marvel Comics, Running a personal online store