



10+ years in finance. 8+ years valuation: financial reporting, tax, shareholder/ litigation valuations & 2+years: FP&A, strategy; investor relations. Advanced excel modeling with large data sets. Maintained responsibility for due diligence, modeling, analysis & reports for ASC 805/820, ASC 350/360 & ASC 718. Applied to privately held, closely held & publicly traded companies within: healthcare, sensor/high technologies, pharmaceutical/life sciences, automotive, engineering, aerospace, consumer industrial, HVAC, laundromats, retail/brand, manufacturing/distribution, energy/alternative energy, traffic engineering, media/technology/software, restaurants, real estate, entertainment, cannabis, education & telecommunications

Professional Experience

Jia Wu

SUMMARY

Analysis & decision making, commercial awareness, creativity, customer focus, influence and communication, leadership and team working, planning and organizing, self-management;

Curious & adept at grasping complex concepts. Works well under pressure with attention to detail;

Experienced with audit, tax, accounting, HR, PE firms, management

SKILLS

Advanced user of Capital IQ, VBA/Microsoft (Excel, Word, PPT) Adobe Suite (InDesign, Illustrator, Photoshop, Acrobat Pro), Anaplan & Tableau;

Leadership, interpersonal communication, presentations (verbal & written), team building & resource allocation

EDUCATION/ HONORS

CFA Level II Candidate- May 2025

ASA designation in progress
Admin Manager & BV Chair
Northern California ASA

Cal Poly Pomona

BS in Finance, Real Estate & Law,
Finance Major, Economics Minor (with 3
Calculus courses) Cum Laude

Honors

Recognized as 1 of 3 outstanding students in
Business Dean's graduation speech,
President's Council Scholar, Tournament of
Roses Parade Scholar, and Tomkoria Family
Scholar, Rose Float Club Rookie of the Year.

CFA IRC, 1st place team

Telecommunications Valuations

Valuation Consultant | JSI, LLC (Telecommunications Consultancy) | Remote Mar '24-Present

Built 10-year models, 3-statement financials, valuation for ESOP, Goodwill Impairment, Gift/Estate Tax & Purchase Price Allocation. Prepared teaser for sale to potential buyers; tracked transactions for deal sourcing, sell side deals; prepared financial projections for management

- ❖ Built; delivered 10-year financial model, included debt repayment schedules, outlay of CAPEX; USAC funding variables. Applied model for ESOP valuation. Assessed & managed risks: liquidity, company, industry, market and its impact on FV, per share price to shareholders.
- ❖ Prepared multiple 3-statement models (P&L, BS, and Statement of Cash Flows) for critical infrastructure grants. Ran 5-year debt tests (leverage ratio, debt service coverage, time interest earned and current ratio). Navigated cost studies; fields that drove financial metrics/KPIs

Start-up FP&A/ Project Finance

Financial Analyst | KCS Homes, LLC dba Built-NV (Start-up Real Estate) | Reno, NV Aug '23-Nov '23

Owned & managed FP&A budgeting, financial models, forecasts. Valuation of & analysis of 3 statement-model, variance budget to actuals analysis, CEO metrics. Reviewed investment opportunities & collaborated with operating businesses to gather info for financial analysis

- ❖ Determined capital calls & economics derived from market research for investment theses. Presented proforma, debt, IRR, NPV, cost/benefit analysis, cashflow & margins impact
- ❖ Prepared DCF, financial valuation & analysis for 3 ventures. Generated sensitivity analysis for land deal negotiation. Ran pivot table to dissect large data set that resolved accounting misses.

Financial Reporting & Valuations

Valuation Manager | Marshall & Stevens Inc. | Los Angeles, CA | Remote Oct '21-Nov '22

Trained 5 associates on business valuation, financial modeling & best practices for analysis

- ❖ Completed valuation for portfolio of funds, personal goodwill, shareholder disputes, fairness opinion (calculation of debt ratios) for level 2/3 assets. Reviewed forecasts, debt covenants for loan portfolio analysis for asset-based lending via synthetic debt rating, and determination of WAM & default/loss given default. Maintained document for portfolio valuation process.
- ❖ Developed strong industry competitive knowledge. Researched businesses, industries & competitors for multiple work streams using a comprehensive & self-directed analytical approach. Provided market intelligence on selected transactions & companies.
- ❖ Built & maintained financial valuation models. Communicated financial analysis, scenario & sensitivity analyses to management. Led diligence calls and deliverables for financial reporting purposes (ASC 805, ASC 820, ASC 718) US GAAP, included working capital analysis, liquidity ratios calculations & waterfall calculations for capital structure after financing events

Corporate FP&A, Investor Relations

Senior Financial Analyst | LegalZoom.com, Inc. (Nasdaq: LZ) | Glendale, CA | Remote Aug '20-Aug '21

Prepared Investor decks, earnings scripts, Q&As, supplemental financial files related to 10-Q, MD&A using Tableau & SQL tools to articulate company strategy, financial results, growth opportunities & business initiatives to current, potential shareholders & analysts

- ❖ Utilized Anaplan & Tableau integrated into a model, consisting of large/complex financial datasets to link performance, strategic & financial data for high-level planning & assessments in response to management/CFO/private equity & disseminated to stakeholders & C-suite
- ❖ Facilitated various business models integrated into end-to-end corporate planning, forecasting & reporting processes. Partnered with sales, marketing, engineering finance to assess impact of new business drivers, business models, KPIs, and other ad-hoc analyses into existing systems & processes. Collaborated with HR, private equity, legal, finance, accounting for ESG reporting
- ❖ Assessed reasonableness of auditor's DCF, multiples, IRR, customers, workforce & contingent liability. Developed pro forma for acquisition of tax/accounting services firm. Completed memo for ASC 350 step 0 & variances of goodwill & stock compensation

LANGUAGES

Native English Speaker
Conversational Cantonese & Mandarin

INTERESTS

+Completed 1 Marathon, 5 Half Marathons, 5 Bike Centuries, 2023 Reno Tahoe Odyssey (178 miles-10 person team), Pilates

+Endo Economics Certificate- US-China Relations: What Is at Stake - Nov 2023.

+Professor for a Day, Cal Poly Pomona

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Public Accounting Valuations

Valuation Manager | SingerLewak LLP | Irvine, CA |

Aug '19-Mar '20

Analyzed company performance & selected multiples of competitors & transactions in line with subject. Performed mark-to-market for closed end funds, REITs, RELP data, distributions, yield to price, price to NAV, and price to FFOs

- ❖ Led valuations for satellite office & provided CPE training to audit/tax that led to \$27K
- ❖ Spearheaded efforts to improve functional use & presentation of financial models for US GAAP ASC 805/820/718, gift/estate/tax reporting
- ❖ Modeled FCF projections, contingent liabilities & sensitivity analysis for business scenarios. Analyzed reasonableness of forecasts to historical P&Ls & adjusted for non-recurring/extraordinary items

Consulting Firm, Valuations Experience continued

Valuations Consultant | Globalview Advisors LLC | Irvine, CA |

Aug '14-Mar '19

Performed Fair Value of non-compete/mgmt agreements, trade name/trademark, customers/contracts/order backlog, technology, inventory, workforce & contingent liabilities with @Risk, Monte Carlo simulation.

- ❖ Performed business enterprise/equity value & equity allocations for stock options/share-based compensation using OPM.
- ❖ Performed Fair Market Value with discounts for lack of control and/or marketability for minority/non-controlling interests.
- ❖ Created a memorandum for a publicly traded engineering company
- ❖ Streamlined customer attrition analysis within days via VLOOKUP, INDEX/MATCH & pivot tables
- ❖ Solved consumer loan valuation, included default, delinquency and nonperforming, duration, credit risk & time to maturity factors
- ❖ Created investment pitch/board deck/CIM for investor/public financing for start-up technology companies: overview & key investment highlights, market opportunity, financial results, projections, valuation, business drivers, risk factors & appendices

Selected Acquisition of Companies, Related

Valuations Consultant | Globalview Advisors LLC | Irvine, CA |

Aug '14-Mar '19

1. Surgical Care Affiliates Acquisition of Ambulatory Surgery Centers (In 2017, UnitedHealth Group's OptumCare acquired Surgical Care Affiliates (SCA) for \$2.3BN in a cash and stock deal.

a. Valuation of non-compete agreements, trade name/trademark, AAAHC or JC accreditations, customer relationships.

2. Jacobs Engineering Acquisition of CHM2 Hill at \$2.85BN as of December 5, 2017 & goodwill impairment analysis completed with new business segment created and considerations of (intercompany consolidations) a. Energy & Power, b. Transportation, c. Building Construction, Water, Sewer and Waste, d. Industrial and Manufacturing, e. Engineering, Construction, Architectural Firms

3. SitologIQ \$14.4M acquisition of Monterey Energy, Inc. as of February 21, 2018

4. Diversified Thermal Services \$13.6M equity, 60% & 10% equity interest appraised, respectively (\$8.2M and \$800k).

5. Maxgen Energy Services acquisition of M+W Energy, Inc. on January 19, 2018

6. MaxGen Energy Services, Inc. acquisition of Arista Renewable Energies, Inc. on April 11, 2018

Investment Related/Wealth Management Related Experience

Equity Research Analyst | Lombard Street Research | London, United Kingdom, London, EC4R 2RU |

Apr '14-Jun '14

- ❖ Provided economic forecasts to improve investment thinking and strategic decisions of financial institutions, banks and corporations
- ❖ Populated and organized macroeconomic data using Excel on a variety of data sources alongside economists
- ❖ Worked in R statistical programming environment for Chinese data seasonality adjustments

Investment Operations | Northwestern Mutual | Los Angeles, CA |

Sep '13-Dec '13

- ❖ Used NetX360 for investment services in data management, document filing, organization
- ❖ Drafted new accounts (401k, SEP IRAs, Roth IRAs, Traditional IRAs, Custodial accounts)
- ❖ Provided operations support, maintained client accounts and updated change in beneficiaries

Licensed Financial Representative | Northwestern Mutual | Los Angeles, CA |

Apr '12-Dec '13

- ❖ Gained new leadership skills with managing partner
- ❖ Discussed personal, professional, and financial goals to uncover client's needs
- ❖ Presented recommendations to fill client needs and earned \$10k worth in premium

Management/Leadership/Volunteer Experience

Northern California, American Society of Appraisers (ASA)

Admin Manager & Business Valuation Chair, (Board Member) | June 2024 – Present

- Management & execution of email correspondence, marketing releases to promote events & social outreach to existing & new members. Aimed to outreach to new & existing speakers for webinar engagements.

Monument Valuations

Owner & Managing Member of Valuations & Advisory Firm | 2023 – Present

FEI Networking

Networking group sponsored by Globalview Advisors | 2014-2018

- Fostered & established relationships with financial executives from attendance of dinners, workshops, seminars, hikes and to other informal meetings
- Maintained relationships & helped colleagues in achieving job offers as a result of my strong referrals network in accounting/finance/consulting fields

Marketing Volunteer

CFA Society Orange County (CFAOC) | Nov 2019 - Dec 2019

- Designed program brochure for award ceremony in recognition of new CFA charter holder members

President

Cal Poly Pomona Rose Float | Feb 2013 - Feb 2014

- Served on leadership management team, trained over 30 students for 52 weeks of float building, per year for two campuses
- Made marketing and budgeting decisions, for \$10k in valued merchandise, food, and special events, tripled club membership
- Managed & supervised a retail location, for two consecutive weeks in the City of Pasadena, earned \$5k
- Published press releases and newsletters on website and led outreach initiatives for donations to feed hundreds of volunteers
- Led brainstorming for fundraising, merchandise, cuisine, special events, marketing, web design and photography departments
- Raised over \$1k from Relay for Life Hodgkin's Lymphoma Cause, comedic tapings, and food fundraisers for the club
- Delivered interviews, outreached to Alumni, and promoted the program through public relations material attracting hundreds of volunteers to help design, build and decorate the float and attract club members to commit to a year-long unpaid project
- Worked cross-functionally to bring initiatives to life; acted as liaison between university counterparts, faculty, and volunteers, highlighted the significance of learn by doing through project management and involvement in the program

Merchandise Coordinator

Cal Poly Pomona Rose Float | Feb 2012 - Feb 2013

- Collaborated with Cal Poly San Luis Obispo in merchandise design, procurement, and marketing
- Managed and supervised a retail tent for two consecutive weeks in the City of Pasadena, earning \$5k in profit

Marketing Coordinator

Cal Poly Pomona Rose Float | Feb 2011 - Jan 2012

- Increased paid club membership Fall quarter by three-fold
- Collaborated with internal and external media groups for promotional videos, press releases, and monthly newsletters
- Coordinated marketing endeavors including: (Newcomer's Picnic, Tournament of Roses Queen and Court Luncheon, Rose Day, Appreciation Day, Design & Decorations Week, Concept Contest, Viewer's Choice Award, Donations, and Merchandise)

PUBLISHINGS

High School Yearbook as Editor & Editor in Chief | 2008-2010

- Designed yearbook theme through layouts using Adobe InDesign, Photoshop, Illustrator
- Divided up sections of book to staff of 30 & selected, edited, reviewed copy and photography
- Spearheaded staff into ideation to execution of content and submitted final layouts to publisher