

Brian (Ka Yue) To

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EDUCATION

University of California: Berkeley, Haas School of Business

Berkeley, California

Bachelor of Science: Business Administration

Expected: May 2024

- **GPA: 3.94 | Dean's List, Honors**

- Relevant Coursework: Introduction to Finance, International Consulting, Financial & Managerial Accounting, Financial Modeling

PROFESSIONAL EXPERIENCE

KPMG | Accounting Firm

San Francisco, California

Audit Intern

Jun 2023 – August 2023

- Identified discrepancies of over \$50,000 through conducting rigorous substantive testing of accounts with high risks of material misstatements, including transactions analysis and accounts reconciliation using KPMG Clara platform powered by Microsoft
- Evaluated 1200+ expense logs for clients and created insightful data visualizations through the use of pivot tables and Alteryx to document audit procedures and analyze trends, anomalies, and potential pain points within the company's operations
- Created 10+ audit documents for major companies in the technology industry to demonstrate the accuracy of general ledger accounts for business processes through the use of Power BI and DataSnipper, adhering to GAAP standards

Optimir Consulting | Non-Profit Consulting Organization

Berkeley, California

Senior Consultant

Dec 2022 - Present

- Devised a market entry strategy for a technology startup through extensive market research and analysis, leading to a successful execution of pilot studies within the US's premier retailers, pioneering product expansions in 20+ stores in California
- Led a team of 6 in constructing marketing strategies, including the cultivation of local partnerships and SEO optimization, by refining customer surveys and streamlining comprehensive industry research, driving a 35% surge in brand awareness
- Developed a pricing strategy database via Tableau by identifying key factors of pricing tiers, market benchmarks, and competitors

Tumi | Luxury Luggage Manufacturer

Livermore, California

Associate Manager

Jan 2022 – Jun 2022

- Exceeded key performance indicators (KPIs), such as Dollars Per Transaction, by 6% by architecting and implementing a monthly growth plan by initiating weekly discussion sessions with employees to collaboratively formulate highly effective sales strategies
- Achieved a 15% reduction in expenses by analyzing the budget plan to eliminate superfluous expenditure on store supplies

World Financial Group | Financial Service Company

Remote

Training Associate

Sep 2021 – Dec 2021

- Engaged with 50+ clients, ages 40 to 60, to assess their financial goals and construct personalized plans, increasing client satisfaction by 25% through delivering holistic financial strategies and hosting bi-weekly investment seminars
- Empowered and mentored 20+ training associates through dynamic team-building activities, maintaining a 100% retention rate

AIA Group Limited | Investment Holding Company

Hong Kong

Wealth Management Intern

Jul 2021 – Aug 2021

- Contributed to the overall expansion of revenue by 5% through customizing financial models and researching market trends with the advisory team to offer wealth management recommendations to achieve the goals of high-profile clients
- Maximized operational efficiency by revamping a database of 500+ potential and current client contacts via Excel functionalities

LEADERSHIP EXPERIENCE

Core Consulting Group | USC & Berkeley Haas-Sponsored Organization

Berkeley, California

Co-founder & Vice President of Internal Affairs

July 2022 – Present

- Spearheaded the sourcing process of 3+ prospective projects with Fortune 500 companies by crafting personalized emails, scheduling weekly meetings to nurture relationships, and conducting pitch meetings, achieved securing funding of \$10K+
- Designed an interactive curriculum including casing workshops to strengthen 70+ members' consulting knowledge and launched a mentorship program connecting 50+ Haas alumni to provide insights to members for career development and tight-knit network

California Phi Beta Lambda | Non-Profit Student Business Organization

Santa Maria, California

Director of Membership

Apr 2021 – May 2022

- Established 3 new chapters across universities and community colleges in California by entering untapped markets, which resulted in the recruitment of over 60 new members, driving significant growth in the organization's member base
- Orchestrated the first in-person conference in an SF 5 stars hotel with 100+ attendees in collaboration with state officers, overseeing all aspects of event planning, including venue selection, budget management, scheduling, and coordination of logistics

ADDITIONAL

Certificate: Sutardja Center for Entrepreneurship & Technology

Skills: Power BI, DataSnipper, Alteryx, MS Suite (Excel, Powerpoint), G Suite, Cantonese (Native), Mandarin (fluent)

Interests: Long-Distance Running, Basketball, Hiking, Strength Training, Traveling, Cooking, Roadtripping