

YALING ZHANG, MBA

Junior Portfolio Manager
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Matthew Johnson

Senior Hiring Manager

NY Equities

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matthewjohnson@nyequities.com

Dear Mr. Johnson:

As a junior portfolio manager for Jones Investments, I managed 50 multi-asset portfolio accounts valued at up to \$15 million and communicated with clients to identify investment opportunities. I can bring the same level of diligence to the role of associate portfolio manager with NY Equities.

With eight years of experience in portfolio management, I can support your organization's strategic goals of investing globally in untapped market verticals. In 2023, I received the Portfolio Manager of the Year Award for achieving a 300% return on investment (ROI) following a key acquisition. Below, you'll find a list of my most notable accomplishments:

- Collaborated with senior financial analysts to develop comprehensive investment strategies, identify optimal portfolio structures, and exceed ROI goals by 200% to 300%
- Served as the point of contact for 50 multi-million dollar client accounts, managed stakeholder relationships, and identified opportunities to enhance portfolio growth and performance
- Performed due diligence on potential investments, evaluated risks and market indicators, and analyzed financial health and positioning of acquisitions

I would like to schedule an interview to tell you more about how my expertise in strategic investing can help grow your client portfolios. Feel free to contact me via phone or email at your convenience. Thank you for your time and consideration.

Best regards,

(Insert Signature Here)

YALING ZHANG