

MICHELLE YIHAN XU, MBA

Tel: (917) 856-3842 | Email: michelle.xu@yale.edu | www.linkedin.com/in/michelleyihanxu

EDUCATION

YALE SCHOOL OF MANAGEMENT

New Haven, CT

Master of Advanced Management (MAM), Management Science Concentration (STEM)

2024

- Merit Scholarship; Yale SOM Admissions Ambassador; VP Career at Yale SOM Greater China Club

ROTMAN SCHOOL OF MANAGEMENT, UNIVERSITY OF TORONTO

Toronto, Canada

Master of Business Administration (MBA)

2023

- Awards: Recipient of 2 awards for academic merit and leadership achievement
- Extracurricular: Held 4 leadership positions among 7 active club memberships

SAUDER SCHOOL OF BUSINESS, UNIVERSITY OF BRITISH COLUMBIA

Vancouver, Canada

Bachelor of Commerce, Double Major in Finance and International Business

2017

- Awards: Dean's List, 2014 – 2015; recipient of 3 awards for academic merit and leadership achievement
- Extracurricular: Held a total of 11 different leadership positions across 8 student governments and clubs

PROFESSIONAL EXPERIENCE

YALE VENTURES

New Haven, CT

Venture Associate, Roberts Innovation Fund

2023 – Present

- Conducted due diligence on Yale faculty-led projects, offered strategic support, and created investor memos

SUN LIFE CAPITAL (SLC) MANAGEMENT

Toronto, Canada

MBA Intern, Private Fixed Income

May – December 2022

- Performed due diligence on 3 deals in US and UK by conducting fixed income pricing and relative value analysis, creating financial models, researching the market, and analyzing credit risk and ESG factors
- Executed 2 deals with a total size of C\$120M in Private Real Estate sector and coordinated with internal counsels by communicating key deadlines, monitoring information flow, and addressing execution risks
- Led the deal sourcing effort of Private Equity Fund Investment Project by identifying market growth and industry trends, researching potential GPs, and organizing due diligence calls with GPs to gather insights
- Performed annual credit review and delivered 80 comprehensive reports and rating change memos for investments in North America, Europe, and Oceania by analyzing financial statements, researching macroeconomic conditions, and compiling ESG impact analysis

HSBC CANADA

Vancouver, Canada

Premier Relationship Manager & Mutual Fund Advisor

2019 – 2021

- Managed C\$100M portfolio for 700 premier clients and achieved 120% of target portfolio size by liaising with asset managers, conducting market research and financial analysis, and offering periodic client reviews
- Received nation-wide HSBC Lion Award for strong performance and leadership; recognized as a Role Model for Compliance and Auditing by representing the team and interviewing with head office

Premium Banker & Mutual Fund Advisor

2018 – 2019

- Delivered outstanding service and financial advice, accomplished 200% of aggregate target, ranked as Top 10 performer nation-wide, and received a promotion of two levels to Premier Relationship Manager
- Collaborated with cross-functional teams to establish partnership with Canadian universities to attract new clients; acted as key contact for UBC students and achieved 180% of expected client growth

ADDITIONAL INFORMATION

- **Languages:** Chinese (native), English (fluent), French (basic)
- **Skills:** Financial Modeling, Due Diligence, StatTools, Capital IQ, FactSet, Preqin, PitchBook, Python, R
- **Certificates:** Bloomberg Environmental Social Governance (ESG), 2023; Bloomberg Market Concepts (BMC), 2021; Bain General Manager Bootcamp, 2021; Investment Funds in Canada (IFC), 2018