

MARY LI

365-777-9988 | m294li@uwaterloo.ca | [uWaterloo ID: 21123809](#) | github.com/Enskyu | linkedin.com/mary-li

EDUCATION

University of Waterloo

Waterloo, ON

Honours Mathematics/Financial Analysis and Risk Management

Sep. 2024 - Apr. 2029 (Anticipated)

Relevant Coursework: Designing Functional Programs; Probability; Statistics; Introductory Courses: Financial Markets, Financial Accounting, Managerial Accounting, Financial Mathematics

WORK EXPERIENCE

Business Operations Intern

Jan '26 – Apr '26

RBC Wealth Management (Royal Trust)

Toronto, ON

- Managed ongoing updates to a real estate database, ensuring accurate and up-to-date client and property information.
- Supported property assessment workflows by compiling documentation and preparing relevant reporting.
- Shared cross-border wire details with AML to support compliance reviews and reduce transaction risk.
- Checked client portfolios daily for major corporate actions (e.g., mergers) to prevent client and bank loss.
- Processed and issued tax-related payments in accordance with established procedures and timelines.
- Coordinated annual mailing activities by preparing materials, tracking completion, and resolving exceptions.
- Provided administrative support within RBC WM Royal Trust, contributing to efficient day-to-day operations.

Accounting Clerk

May '25 – Aug '25

The PBAS Group

Etobicoke, ON

- Reconciled 100+ monthly bank transactions over three months with complete accuracy, maintaining balanced records.
- Processed 50+ AR invoices daily in Sage 300 with 100% accuracy and efficiency.
- Scanned and deposited 30–50 cheques monthly using reader, maintaining documentation for audit compliance.
- Streamlined AP inbox by grouping emails, cutting invoice processing time by approximately 30% overall.
- Filed 100+ EFT remittances monthly into folders, improving accessibility and ensuring audit readiness.
- Redesigned storage for 1,200+ invoices, switching to monthly folders, improving efficiency by 40%.

Research Support

Apr '25 – Aug '25

Trinity Partners

Toronto, ON

- Developed a Python web scraping tool that extracts financial data based on user-inputted company names and generates structured PDF reports, automating a previously manual process and improving research efficiency by 80%.
- Analyzed 10 years of financial data of corporations using AI tools to support informed investment decisions.

PROJECTS AND EXTRACURRICULARS

Vice President, Finance | The Mathematics Society of the University of Waterloo

May '26 – Current

- Assisted with daily cash close procedures, ensuring accuracy and compliance with financial protocols
- Processed cheque reimbursements for MathSoc, clubs, and partners with WUSA, ensuring timely transactions
- Managed central and club budgets, monitoring variances against council-approved allocations
- Recruited and onboarded finance directors to support operations and improve team efficiency

Hack the Market 2026 | Python | Github

Jan '26

- Built a Python news-sentiment trading pipeline using the Gemini API to score `market_news.csv` in $[-1, 1]$.
- Designed a next-day long/short strategy for AAPL/MSFT/TSLA using lagging, threshold filters, and normalized exposure.
- Optimized via grid search and heatmaps; achieved **60.69% total return** and a **4.48 Sharpe ratio** (vs SPY benchmark).
- Implemented a backtesting framework with risk metrics and benchmark comparisons against SPY and buy-and-hold.
- Tied for 6th out of 50 participants in the competition.

Simulated Stock Market Portfolio | Stocktrak

Sept '24 – Current

- Constructed a simulated portfolio of potentially profitable stocks through profit ratio analysis and qualitative evaluation and achieved a peak rank of 13 in the Math Faculty during the 2024-2025 simulation.
- Applied principles of growth investing to identify and assess high-potential investment opportunities, with one investment having 150%+ growth in two months.
- Enhanced analytical and decision-making skills in financial market simulation.

SKILLS

Software: Python, Excel, SAGE300, Broadridge, ClientSource, AS400, SQL, Tableau, Powerpoint, Outlook, Word, Java

Soft skills: Assertiveness, Communication, Teamwork, Analytical thinking, Adaptability, Time management