

# Yuqi Wan

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## Objective Statement

Current undergraduate senior in Accounting and Business Systems & Processes. To obtain an internship within audit, advisory, or consulting of a public accounting firm.

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## Education

Bachelor of Science: Accounting, Business Systems & Processes (STEM major); Minor – Finance. December 2021  
*Graduating with 150 hours.* Towson University, Towson, MD

Total GPA: 3.94 Major GPA: 3.97

Dean's List: Spring 2018 – Present. Honor College: Spring 2019 – Present.

Award: Third place in the Innovation topic of Best Practices at the Beta Alpha Psi Atlantic Coast Regional Meeting.

Affiliations: Beta Alpha Psi, National Association of Black Accountants, Beta Gamma Sigma, Maryland Association of CPAs.

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## Employment Experience

**Audit Internship in SB & Company, Owings Mills, MD** June 2020-Present

- Use CCH ProSystems fx Engagement to audit on several different clients, utilizing different skill sets developed during training, including government auditing, nonprofit auditing, and auditing of employee benefit plans.
- Work on client assignments and receive feedback to develop better understanding of auditing concepts and procedures.

**First Year Experience (FYE) Leader – Advising Program, Towson University, MD** August 2020

- Represent New Student and Family Program and engage with different constituencies; led the group and presented workshops.
- Increase leadership and communication skills and welcome new students to a supportive and thriving campus environment.

**Student Consultant at College of Businesses and Economics, Towson University, MD** August 2019-May 2020

- Advised students on academic matters, by accurately interpreting and communicating CBE policies and procedures.
- Participated and manage projects and events and served as a student representative on one college committee.

**Tax Internship in Kenneally & Company, P.A., Towson, MD** February 2020- March 2020

- Used CCH ProSystem fx Tax to prepare an accurate return while taking advantage of all allowable deductions and present the client's data in the most advantageous way, prepared individual and corporation income tax.
- Analyzed client balance sheets and income statements; used excel to perform various tasks.

**Accounting Internship in Moffit & Black CPA, P.C., Pikesville, MD** January 2020- February 2020

- Used QuickBooks and Excel to prepare bank reconciliations for various business accounts and complete journal entries.
- Maintained general ledger write ups monthly; bring the client's trial balance to level of completeness needed for tax return and/or financial statements; prepare Maryland Personal Property Tax returns by using ProSeries.

**Tax Internship in Cash Campaign of Maryland, Towson, MD** January 2019-May 2019

- Interviewed tax clients about their family and financial situation as it relates to their individual tax situation.
  - Prepared tax returns using professional tax software and learned tax law.
  - Helped clients leverage their refunds over time by offering savings and asset development opportunities.
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## Campus Leadership

**President, Beta Alpha Psi, Towson University, MD** May 2020-December 2020

- Strategically plan and address unaccomplished tasks and activities and delegate duties to fellow officers and supervise their progress; Consult with faculty advisors about any difficulties or ideas and oversee every officer's ongoing tasks.
- Manage all activities that the organization participates in and maintain ethical conduct of organization and promote a family atmosphere; contact with employers to organize presentations or other events.

**Participant, Tableau Conference(ish) 2020 | #TC20** October 2020

- Networked at Tableau Conference and bonded over common goals and shared interests.
- Choose from multiple themed channels to find episodes and attended virtual workshops to meet the world-class thought leaders.

**Participant, National Association of Black Accountants 2020 Virtual Student Conferences** September 2020

- Developed and exhibited organizational, leadership and planning skills; Attended workshops to gain industry insights.
- Communicated with professionals and network with them through the career expo.

**Participant, Maryland Association of CPAs' Student Leadership Academy, Baltimore, MD** June 2019

- Be uniquely oriented to the CPA profession and accelerated success as a future CPA by taking an in-depth look at skills and strengths; met top leaders and networked with them to learn business strategies and technology application.
  - Immersed in activities and sessions that prepare for the workplace and further connect to the accounting community.
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## Technical skills

- Software: Microsoft Office Suite, QuickBooks, Office Tools, TaxSlayer, CCH ProSeries fx, Intuit ProSystem, SAP, Tableau.
- Certification: Microsoft Office Specialist Excel 2016, Bloomberg Market Concepts, MACPA Student Leadership Academy Graduate, IRS-Certificate for Individual Income Tax Return, Google Analytics for Beginners.
- Languages: Mandarin Chinese (fluent), English (fluent).