

Kevin K. Wu, MBA

Weehawken, NJ 07086 • kevin.wu@kevin-wu.com

PROFESSIONAL EXPERIENCE

Rothstein Kass

New York, NY

Administrative Assistant, Financial Services Audit

October 2011 – Present

A top-ranked, premier professional services firm providing audit, tax, accounting, and advisory services to hedge funds, funds of funds, private equity funds, broker-dealers and registered investment advisors, and high-net-worth individuals/families.

- Directly support the Co-Managing Principal of the firm and three Principals in the Financial Services Accounting & Audit department, with administrative support, preparing expense reports, and assist with setup and breakdown of firm events.
- Respond to due diligence requests from investors confirming the firm is engaged to audit client hedge funds, funds of funds, equity funds, broker-dealers and registered investment advisors for risk management and compliance purposes.
- Write up client proposals, enter new opportunities and contact information into CRM (Client Relationship Management) software program, compile and enter background check information, and input new clients into system for approval.
- Prepare and edit correspondence, communications, presentations and other documents, including legal documents.
- Create, format, and edit new and existing spreadsheets, used in financial statements, assembling pertinent information, tracking expenses, billing and invoicing purposes, and ongoing project management tracking purposes.
- Submit invoice requests and billing changes, and merge financial statements and documents prior to binding.
- Create PowerPoint presentations for training, informational and marketing purposes, including an introduction to hedge funds, & the introductory presentation event of the "Women in Alternative Investments" Rothstein Kass survey at Christies.
- Conduct research and compile background biographies of individuals and booklets with hundreds of biographies of prospective clients attending regional/national alternative investment and hedge fund summits and conferences.
- Member of the firm Environmental Focus Group, and organized the local firm New York Office Business Book Club.

The Macerich Company – Cross County Shopping Center

Yonkers, NY

Administrative Assistant

March 2008 – October 2011

Macerich (NYSE: MAC) is one of the country's leading owners, operators and developers of exceptional major retail real estate properties in attractive U.S. markets, with a total gross leasable area of 66 million square feet in 65 super regional shopping centers.

- Direct executive support for 5 executives, including an Assistant Vice-President, Property Manager, and 3 Department Managers, with administrative support, taking on projects on their behalf, and decision-making on their behalf.
- Prepared & edited correspondence, communications, presentations and other documents, including legal documents.
- Created financial spreadsheets using simple to complex Excel formulas for cost analysis comparisons, legal expenses, operating expenditures, accounts receivables, tenant rent rolls, statistics reports, corporate mandated surveys, and for compiling and assembling data required for annual payroll reviews and for tax credit or audit related purposes.
- Conducted research, assemble & analyze data to prepare reports and documents, and coordinate project-based work.
- Improved processes and procedures for routine or repetitive tasks to increase productivity and focus on larger projects.
- Developed storage lease and special event agreements as needed, including negotiating fees and logistics of events.
- Compiled financial spreadsheets and spreadsheets for tracking expenses, inventories, and corporate mandated surveys.
- Generated spreadsheets for assembling pertinent information for quick on-hand reference of employees and accounts.
- Compiled paperwork required during loan financing application process for a \$150 million dollar redevelopment loan.
- Processed payroll and review timecards on a weekly basis, and handle worker's compensation and disability claims.
- Participated in planning process and preparation of all creative aspects of marketing programs and event planning.

Capitol Risk Concepts

White Plains, NY

Marine Accounts Assistant

August 2006 - March 2008

A medium-sized insurance brokerage firm providing maritime cargo insurance coverage and specializing in the seafood industry.

- Administrative support to the Marine Accounts Manager & prepare monthly insurance reports for cargo shipments.
- Maintained current client account data & prepare data entry of monthly insurance reports for marine cargo shipments.
- Created binders and endorsements required for policy changes, and issued certificates of insurance for policy holders.
- Collected, reconciled, and processed periodic client cargo shipment reports, prior to conveyance to insurance carrier.
- Compiled data for policy renewal process, including annual cargo reports, annual premium generated, and total losses.

High Ridge Properties

New York, NY

Executive Assistant

June 2004 - August 2006

New York & New Jersey real estate developers of luxury homes, condominiums, and subdivision of retail commercial properties.

- Provided business and personal administrative support for two executives of a real estate development company.
 - Screened calls, setup conference calls, scheduled appointments, arranged meetings, and prepared information packs.
 - Assisted in creating construction cost estimates for various projects, including cost comparison of work estimates from sub-contractors, such as masonry, carpenters, electrical, plumbing, HVAC, fireplace, and security installers.
 - Created spreadsheet estimates for lumber, doors, windows, flooring, roofing, appliances, & landscaping supplies.
 - Handled personal matters for both executives, including travel arrangements & reservations, preparation of expense reports, personal medical records, family health insurance, monthly utility and other bills, and shop for personal items.
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ACADEMIC QUALIFICATIONS/TRAINING

Long Island University – Master of Business Administration in Finance & Management, Graduated w/ Distinction September 2010

Purchase College - Bachelor of Arts in Liberal Studies January 2008

Notary Public – Qualified in the State of New York

Knowledge: Microsoft Office (Word, Excel, PowerPoint, Publisher, & Outlook), Acrobat, Photoshop, and CRM software