

Shawn Li

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PROFILE

Astute and compassionate professional with proven client-centered experience seeking a September 2021 clinical family therapy internship. Seasoned to work well under pressure, tech-savvy, and possessing accurate time management skills. Innate ability to work with a variety of personality types and populations.

EXPERIENCE

DOWNTOWN MUSIC HOLDINGS

New York, NY

Director of Financial Operations | 2018-2020

Financial Operations Analyst | 2017-2018

- Led company-wide adoption of Salesforce to upgrade global business performance tracking, mediating consensus amongst various levels of the organization
- Developed a central database to streamline compliance requirements and administered global tax reporting requirements

BETTERMENT

New York, NY

Customer Experience Manager | 2016-2017

Customer Experience Supervisor | 2015-2016

Customer Experience Associate | 2014-2015

- Supervised a team of 21 through targeted team training, creating new best practices, and improved employee engagement
- Reviewed an average of 100 cases per day by telephone, email, and text to ensure client satisfaction and uphold fiduciary standards

KPMG (FORMERLY ROTHSTEIN KASS)

New York, NY

Tax Associate II | 2012-2013

Tax Associate I | 2011-2012

- Prepared tax returns for individuals, corporations, and trusts for high-net worth family offices
- Collaborated with senior managers and partners to develop client rapport and gather necessary information

EDUCATION

NYACK COLLEGE

M.A. Marriage & Family Therapy

- Expecting 2023 | New York, NY

GEORGIA STATE UNIVERSITY

B.B.A. Accounting | Atlanta, GA

GEORGIA TECH

B.S. Management | Atlanta, GA

SKILLS & AFFILIATIONS

- C3.NYC Church, Manhattan Team Lead
- American Association of Marriage and Family Therapy, Student Member
- Friends of Governors Island, Volunteer
- Strala Yoga, Certified Guide