

Trung (Mike) Huynh

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PROFESSIONAL SUMMARY

Finance graduate with hands-on experience in financial analysis, reporting, and building AI workflows. Helped a student portfolio beat sector performance by 20%, supported 30+ clients through complex tax and compliance needs, and built tools that cut reporting time by 15%. Focused on turning data into clear, useful insights that drive better decisions.

EXPERIENCE

Portfolio Scatter (*portfolioscatter.com*)

Jan 2026 - Current

AI Product Builder

- Built a client-facing financial analysis platform integrating 15+ quantitative risk metrics to automate portfolio rebalancing recommendations, improving data-driven decision-making for varying risk profiles
- Backtested bear market scenarios to help clients visualize portfolio resilience and optimize asset allocations
- Applied AI tools like ChatGPT and Claude Code to deepen research on portfolio theory, stress testing, and risk assessment standards used across wealth management

Orange County United Way, Orange County, CA

Tax Preparer

Feb 2026 - Apr 2026

- Prepared 50+ federal and state tax returns for a non-profit during tax season for low-to-moderate income households, maintaining high accuracy under IRS VITA program standards
- Interviewed 100+ clients to assess income sources (W-2, 1099, self-employment) and ensure accurate, compliant tax reporting

Cirigliano Law Firm, Orange, CA

Tax and Accounting Intern

Mar 2025 - Jun 2025

- Improved tax documentation workflows in Prosystem FX and Sage Peachtree, cutting processing time by ~10% and reducing filing errors through better use of existing ERP systems
- Managed relationships with 30+ individual and business clients, ensuring accurate and timely filing across capital gains, partnerships, and self-employment income
- Built automated Excel reports to streamline financial reconciliation, reducing daily data processing time by ~15% and making client account reviews faster and more reliable

Hylander Financial Group (*UCR Student Investment Fund*), Riverside, CA

Lead Equity Research Analyst

Jan 2024 - Jan 2025

- Generated 20% excess return vs. XLY in student equity portfolio by refining valuation models (DCFs, comparables) and investment theses across consumer discretionary sector
- Translated DCF and comps analysis into clear buy/sell reports and RFPs for investment committee review
- Conducted regression analyses on macroeconomic indicators, reducing portfolio drawdowns by 5%

SKILLS

Technical: Financial Modeling, Budgeting, Forecasting, Valuation, Variance Analysis, Cash Flow Analysis

Software: Microsoft Excel (PivotTables, VLOOKUP, Power Query, Macros), PowerPoint, Word, Google Workspace, Capital IQ, AI Agentic Application, Salesforce, Claude Cowork, Claude Code, ChatGPT, Codex, Cursor

CERTIFICATIONS

FINRA SIE | IRS VITA Basic | Citi Forage Investment Banking

EDUCATION

University of California Riverside

Sep 2021 - Jun 2025

Bachelor of Science, Business Administration: Finance

GPA: 3.74 | Dean's List, Chancellor's List

Phi Chi Theta - Vice President of Finance: Managed \$40,000+ in organizational funds and created automated monthly financial reports using Excel (VLOOKUP, PivotTables), giving leadership clear, reliable visibility into budget performance across 45+ members