

# Chelsea Kwan

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## EDUCATION

**Northeastern University, D'Amore-McKim School of Business** **Boston, MA**  
*Candidate for BS in Mathematics and Business Administration* *May 2028*  
**Concentration:** Fintech | **Minor:** Data Science *GPA: 3.9*  
**Awards and Activities:** Honors Program, Dean's List, Disrupt Consulting, Generate, Association of Women in Mathematics  
**Relevant Courses:** Probability and Statistics, Stochastic Processes, Differential Equations, Linear Algebra, Mathematical Modeling, Asset Valuation, Financial Econometrics

## TECHNICAL SKILLS

**Programming & Query Languages:** Python, SQL, Cypher  
**Frameworks & Libraries:** Sklearn, NumPy, Pandas, Seaborn, FastAPI, Matplotlib  
**Tools:** Git, Docker, Tableau, Snowflake, Coefficient, PowerPoint, Excel  
**Databases:** PostgreSQL/pgvector, Neo4j, Kuzu

## EXPERIENCE

**Pericles Capital** **Boston, MA**  
*Incoming Quantitative Analyst* *September 2026*

- Joining a systematic research team to study how data-center buildout affects commodity and equity prices

**Klaviyo Inc.** **Boston, MA**  
*Strategic Finance Analyst Co-op* *January 2026 – Present*

- Led negotiations across marketing, GTM, R&D, and G&A branches on \$300K+ deals for key company stakeholders
- Partnered with FP&A, BI, and Security & Risk stakeholders to improve and streamline vendor onboarding by 40%
- Transformed \$20M in R&D and IT spend data to develop comprehensive category strategy along Senior VPs
- Analyzed \$5B+ in contracts via SQL to prioritize sourcing and drive spend efficiency across all cost centers
- Built comprehensive savings process to quantify impact – captured \$374K in savings and \$5.4M in cost avoidance
- Designed and implemented 6+ procurement automations to reduce manual overhead and accelerate decision-making

**Generate** **Boston, MA**  
*Data Engineer* *January 2026 - Present*

- Executed end-to-end data engineering pipeline designed to scale to 100+ documents across multiple file formats
- Transformed unstructured data to standardized format for relationship extraction and knowledge graph construction
- Designed AI-accessible graph database leveraging context engineering and Python to improve data discoverability
- Built pipelines parsing PDFs & CSVs into structured JSON stored across Neo4j, S3 & Supabase PostgreSQL
- Reduced retrieval overhead by 60% by improving model responses with natural language knowledge graph search

**Disrupt FinTech Consulting** **Boston, MA**  
*Director of Consulting & Strategy Lead* *May 2025 – Present*

- Directed and mentored 24+ consultants and developers across 5 strategic and technical client consulting projects
- Drove client acquisition by conducting fintech market research, reaching out to 100+ fintech startup founders
- Converted leads into partnerships through strategic outreach, directed key stakeholder meetings and scoping projects
- Guided client deliverables and presented project outcomes to an audience of 80+ students and stakeholders
- Led recruitment and growth strategy, expanded consultant pipeline by 70% and scaled organization by 300%

## PROJECTS

**Markowitz and SIM Model-based Stock Analysis** **Boston, MA**  
*Asset Valuation Analyst | Excel, Data Analysis ToolPak* *December 2025*

- Conducted equity analysis by computing Sharpe Ratios, CAPM regressions, and betas on daily/monthly frequencies
- Built and analyzed portfolios using Markowitz Mean-Variance Optimization and the Single Index Model
- Constructed efficiency frontier, estimated covariance matrix, and solved for max-Sharpe tangency portfolio
- Determined optimal capital allocations for a 5-asset universe with \$1,000, balancing risk-adjusted returns

**Abalone Data Analytics and Predictive Modeling** **Boston, MA**  
*Machine Learning Researcher | Python, Matplotlib, Numpy, Pandas, Sklearn* *November 2025*

- Developed linear regression model and KNN classifier to predict age from measurements on 4,177-sample dataset
- Standardized features and encoded the categorical sex variable to support distance-based KNN modeling
- Visualized model performance via annotated heatmaps, regression prediction scatter plots, and confusion matrices

## INTERESTS

**Interests:** Jazz/Classical Music, Formula 1, Pottery, Guitar, Reading, Baking, Traveling  
**Languages:** English (Native), Mandarin (Working Proficiency)