

FINANCIAL ANALYST INTERN

Skills

Financial Planning & Analysis, Analytical skills, Forecasting, Portfolio & Wealth Management, Financial Reporting, Business Analysis, Financial Consulting, Quantitative Analysis, Market Research, Financial Modelling, Project Management, Strategy, Operations, Risk Management, Corporate Finance, Global Finance, Product Management, Slabware, Quickbooks, Busy LS, Microsoft Office, Microsoft Excel, Mutual Funds, Alternate Investments, Real Estate Funds, Mortgages, Consumer Loans, Insurance, Microsoft PowerPoint, Microsoft Access, Microsoft Outlook

Experience

05/2017 to 08/2017

Financial Analyst Intern Company Name i¼ City , State

- Augmented company profits by 25% by conducting a detailed financial analysis and refining the budgets and forecasts.
- Analyzed company financial reports to make recommendations for revenue generation and cost reduction.
- Reduced 30% costs by designing financial process tools, and implementing pricing strategies for process improvement.
- Spearheaded and led due diligence for Acue Marmonite's international projects in India, identifying key risk factors and forecasting investment viability and educated the senior management about the project NPV.
- Developed innovative financial tools to simplify Business Requirement Documentation (BRD's), which helped record-keeping, understanding client business and expanding client relationships.

11/2015 to 07/2016

Manager Company Name i¼ City

- Retail Banking - Affluent Business.
- Amplified the high net worth client portfolio from USD 16 million to USD 18 million in less than 9 months.
- Recommended customized product portfolios to high net worth clients through financial planning and investment analysis resulting in average client portfolio growth up to 27%.
- Administered regulatory and procedural compliance to ensure adherence to proper accounting procedures.
- Advised clients about global trade, designing customer centric propositions for hedging and mitigating risk.

09/2013 to 10/2015

Senior Advance Wealth Manager Company Name i¼ City

- Retail Banking, and Wealth Management.
- Increased total portfolio value by USD 5 million, making it the largest in the region.
- Assessed client's financial objectives and risk profiles, identified investment opportunities, and prepared customized recommendations for asset allocation.
- Exhibited leadership capabilities by supporting, training and mentoring a team of wealth managers.
- Achieved highest personal loan sales figures for the year 2014 within the region.

04/2012 to 08/2013

Deputy Manager Company Name i¼ City

- Enhanced portfolio value from USD 0.65 million to USD 1.05 million by acquiring new clients in the region.
- Boosted portfolio growth by 18% by analysing high net worth client portfolios, and advising tailored investment solutions.
- Exceeded bank's budgeted portfolio growth expectations by 34%.
- Carried out non-resident operations in the branch and implemented the retail Foreign Exchange (FX) Rated in TOP 40 mortgage sales performers award PAN INDIA within 5 months of joining Axis Bank.
- Fast-tracked to the position of Senior Wealth Manager within 15 months of joining HSBC.
- Received 'Dynamo' award for outstanding performance and commitment to fairness and integrity (HSBC).
- Ranked first among wealth managers in the HSBC Delhi region (Aug '14).
- Received 'Outstanding Performer' award.
- Ranked first for following Compliance and AML Practices for Operational Excellence in HSBC (2014).

Education and Training

Dec 2017

Master of Business Administration : Financial Analysis and Investments University of Connecticut School of Business i¼ City , State Financial Analysis and Investments STEM - qualifying for 36 months OPT) *Vice President - Marketing & Finance for UConn Graduate Consulting Club

*Student Consultant and Team Lead to CT based Start-up *Winner of the Cigna Strategic Investment Case Challenge

Jun 2010

Bachelor of Arts : Economics Sri Venkateswara College, University of Delhi i¼ City India Economics

Skills

accounting, Analytical skills, Banking, budgets, Business Analysis, Consultant, Consulting, Corporate Finance, cost reduction, client, clients, designing, Documentation, due diligence, senior management, Fast, Finance, Financial, financial analysis, Financial Planning & Analysis, Financial Consulting, financial planning, financial reports, Financial Reporting, Forecasting, Foreign Exchange, Funds, Insurance, investment analysis, Investments, leadership, Team Lead, Market Research, Marketing, mentoring, Microsoft Access, Microsoft Excel, Microsoft Office, Microsoft Outlook, Microsoft PowerPoint, pricing strategies, process improvement, Product Management, Project Management, Quantitative Analysis,

Quickbooks, Real Estate, record-keeping, Requirement, Retail, Risk Management, sales, Strategy, Strategic, Wealth Management