

## Professional Summary

Results-driven financial professional with over five years of experience in **financial analysis, compliance, and planning** within banking and financial institutions. Proficient in **SQL, Tableau, and MS Excel** (Pivot Tables, V-LOOKUP) to deliver actionable insights and streamline financial processes. Adept at **budgetary reconciliations, regulatory compliance, and fostering cross-functional collaboration** to drive organizational growth.

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## Core Competencies

- Financial Analysis & Reporting
  - Budget Reconciliation & Expenditure Tracking
  - Data Analytics (SQL, Tableau)
  - Advanced Microsoft Excel (Pivot Tables, V-LOOKUP)
  - Financial Data Management
  - Regulatory Compliance & Risk Mitigation
  - Cross-Functional Collaboration
  - Business process Improvement
  - Financial Modeling & Forecasting
  - Microsoft Word, PowerPoint, SharePoint
  - Multitasking, Adaptable and flexible
  - Problem solving, logical reasoning and creative thinking
  - Effective Communication (Oral and written)
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## Professional Experience

### Tax Auditor

**California Franchise Tax Board, Sacramento, CA (Jun 2024 – Aug 2024)**

- Reviewed and processed high volumes of invoices, ensuring compliance with tax laws and business regulations.
- Conducted in-depth analysis of fiscal data to identify errors and inefficiencies, streamlining reporting processes.
- Prepared detailed audit reports outlining scope, findings, and recommendations for corrective action.
- Collaborated with cross-functional teams to ensure accurate resource allocation and regulatory compliance.

### Financial Reporting Analyst

**Dena Bank (now Bank of Baroda), Rajkot, India (2012 – 2016)**

- Managed compliance and financial reporting for over 90 branches, ensuring alignment with internal and regulatory standards.
- Spearheaded a client identification consolidation project, reducing duplication by 20% and enhancing audit readiness.
- Reconciled budgets and expenditures across multiple systems, reducing discrepancies by 30%.
- Provided data-driven financial reports to senior management, enabling informed decision-making.

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- Served as a Nodal Officer, coordinating operations across branches and fostering efficiency.

### **Senior Member Service Representative Patelco Credit Union, Berkeley, CA (2018 – 2020)**

- Reviewed client accounts and business documents to ensure adherence to KYC/AML regulations.
- Resolved complex client issues using Salesforce, improving customer satisfaction scores by 20%.
- Collaborated with the Assistant Branch Manager to maintain operational integrity and compliance with audit standards.
- Conducted regulatory research to support compliance with industry policies and requirements.

### **Financial Center Client Service Representative Bank of America, Berkeley, CA (2016 – 2017)**

- Processed high-volume transactions with 100% accuracy, ensuring adherence to institutional policies.
  - Educated clients on digital banking tools, increasing adoption rates by 25% and reducing transaction times.
  - Delivered tailored financial solutions, earning recognition for exemplary customer service.
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### **Education & Certifications**

- **Master's Degree** in Advanced Management Accounting | Saurashtra University
  - **Bachelor's Degree** in Business Administration and Accounting | Saurashtra University
  - Certified Junior Associate of Indian Institute of Banking and Finance (JAIIB)
  - Google **Data Analytics Specialization**
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### **Achievements**

- Reduced invoice discrepancies by **30%** through reconciliation improvements at Dena Bank.
- Consolidated over **5,000 client records**, enhancing compliance and efficiency.
- Achieved "Best Employee of the Month" and "Best Nodal Officer Award" at Dena Bank.
- Boosted client satisfaction scores by **20%** at Patelco Credit Union.