

# MOHD IMRAN

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## PERSONAL FINANCE OFFICER - *leveraging 12+ years of experience*

Personal Finance Officer with a proven track record of identifying ideas and facilitating action-oriented plans to support corporate growth and objectives.

Savvy and skilled Personal Finance Officer with 12+ years of comprehensive investment expertise. Maintains a track record of generating tailored financial strategies to match clients' needs. Manages various portfolios with meticulous attention and ongoing economic trend analysis to identify optimum asset allocation. Successful at assessing commercial and investment opportunities, as well as swiftly grasping companies and markets. Strong performance in new business development, growth, and diversification.

### PROFILE SUMMARY

- Expertise in the creation of financial analyses that help the organization to make critical decisions based on its finances.
- Experienced in financial modelling, forecasting, and complicated analysis.
- Knowledge of quantitative analysis, break-even models, and risk-mitigation measures is required.
- Expert in analyzing financial statements and budgets to discover revenue, expense, and cash flow difficulties.
- Highly proficient in identifying monthly increases in manufacturing expenses and realized costs as a result of a product supply shortage that was alleviated by bringing on additional vendors.
- Responsible for managing acquisitions initiatives by assessing firm finances and doing due diligence.
- Expert at analyzing accounts payable, payroll, taxes, the ledger, and the journal to construct forecasting models for budgeting.

### CORE COMPETENCIES

- |                           |                     |                       |
|---------------------------|---------------------|-----------------------|
| ▪ Portfolio Management    | ▪ Risk Assessment   | ▪ Profit Optimization |
| ▪ Strategic Relationships | ▪ Team Building     | ▪ Economic Assessment |
| ▪ Financial Analysis      | ▪ Market Analysis   | ▪ Resource Management |
| ▪ Account Management      | ▪ Trend Forecasting | ▪ Financial Research  |

### PROFESSIONAL EXPERIENCE

#### Greenlam Industries Ltd., Noida

Jan. 2019 – Present

##### Personal Finance Officer

- Used expertise of tax and investment techniques, securities, insurance, and pension plans, and real estate, developed and implemented financial plans for individuals, enterprises, and organisations.
- Interviewed customers to establish their assets, liabilities, cash flow, insurance coverage, tax status, and financial goals.
- Analyzed the financial situation of the client, produced a financial plan based on the data, and discussed choices with the client.
- Prepared and submitted documentation to implement chosen plan, then kept in touch with the customer to amend plan depending on changing needs or market changes.
- Responsible for qualifying leads from inbound phone calls, quickly building rapport, providing comprehensive information on products and services, and answering all questions.
- Listening attentively to understand and evaluate clients' need for debt relief and propose solutions.
- Building strong client relationships that improved retention and increased referrals.
- Exceeding aggressive forecast sales goal and volume generating exponential amounts of profit for the company.
- Profiling and analyzing investment products to develop customized financial strategies for clients' financial needs.
- Comparing liquidity, profitability, and credit histories of establishments being evaluated with those of similar establishments in the same industries and geographic locations.
- Answering clients' questions about the purposes and details of financial plans and strategies.
- Interviewing clients to determine current income, expenses, insurance coverage, financial objectives, risk tolerance and other information needed to develop a financial plan.

#### Sahni Natarajan & Bahl, Greater Noida

Apr. 2015 – Dec 2018

##### Personal Finance Officer

- Supported the pre-service process by providing coverage verification and authorization for scheduled services.
- Communicated clearly to the patient or patient designee, insurance coverages/benefits, patient financial obligations, and the impact of unpaid services.
- Ensured service orders, patient statuses, and resulting financial obligations are updated in the system
- Verified the accuracy of all insurance information. Conducting patient account assessments.