

# SHUBHAM ARORA

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## FINANCIAL CONSULTANT - leveraging 6+ years of experience

*High-impact Financial Consultant with a proven track record of identifying projects and facilitating action-oriented plans to help companies achieve their goals.*

Financial Consultant with 6 years of experience in a wide range of investments. 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. Equally impressive results in terms of new business development, expansion, and diversification.

### PROFILE SUMMARY

- Proficient in developing financial plans to help clients achieve their long-term and short-term financial goals.
- Skilled in advising clients on taxes, retirement planning, investments, and insurance decisions, depending on their financial goals.
- Competent in assessing how certain life changes and financial status changes affect clients' financial plans and adjusting such plans accordingly.
- Responsible for maintaining good relationships with existing clients and adapting their advice and strategies to meet unexpected changes in financial circumstances
- Adept at soliciting new clients through cold-calling, emailing, advertising, and seminar-hosting.

### CORE COMPETENCIES

- |                       |                                     |                                 |
|-----------------------|-------------------------------------|---------------------------------|
| ▪ Strategic Planning  | ▪ Finance and Accounting            | ▪ Financial Analysis/Consulting |
| ▪ Information Systems | ▪ Profit and Loss Management        | ▪ Business Forecasting          |
| ▪ Cost Accounting     | ▪ Financial Statements and Planning | ▪ Mergers and Acquisitions      |
| ▪ Start-up Operations | ▪ Debt/ Corporate Restructuring     | ▪ Market and Growth Analyses    |
| ▪ Due Diligence       | ▪ Sponsorship Underwriting          | ▪ Staff Management and Training |

### PROFESSIONAL EXPERIENCE

#### Greenlam Industries Ltd, Noida

Jan. 2019 – Present

##### Financial Consultant

- Establish and maintain relationships with individual or business customers or provide assistance with problems these customers may encounter.
- Examine, evaluate, or process loan applications.
- Network within communities to find and attract new business.
- Approve, reject, or coordinate the approval or rejection of lines of credit or commercial, real estate, or personal loans.
- Evaluate financial reporting systems, accounting or collection procedures, or investment activities and make recommendations for changes to procedures, operating systems, budgets, or other financial control functions.
- Develop or analyze information to assess the current or future financial status of firms and evaluate data pertaining to costs to plan budgets.

#### Sahni Natarajan & Bahl, Greater Noida

Apr. 2016 – Dec 2018

##### Financial Consultant

- Resolved complex business/customer service issues by providing & recommending the best possible financial solutions.
- Demonstrated the ability to deal diplomatically and effectively internally/externally with sensitive situations.
- Applied analytical research to interpret findings and respond to requests for information.
- Audited teller cash drawers with working knowledge of branch systems and processes.
- Gathered & analyzed financial/document data with research and workflow to draw conclusions.
- Evaluated budgets, prepared reports for senior management & certified that company policies were in compliance.

### ACADEMIC CREDENTIALS

**Education** – MBA (Accounting and Finance) | VIPS | 2010

BBA, Indraprastha University | 2008

### PERSONAL DOSSIER

- **Languages Known:** English & Hindi

~References and other documents available upon request ~