

Synopsis:

- Working with Bupa Global since April 2016 – Supporting Head of Finance and CEO
- Prior experience:
 - HK - 3.5 years in Accounts / Finance with Morgan Stanley, Boeing and Univan Ship Management
 - Mumbai – 3 years (post qualification) in International Tax with Ernst & Young
- Chartered Accountant – **All India Rank 44**; Cleared CFA Level 2

WORK EXPERIENCE:

I. Bupa Global – Finance Analyst

Since Apr. '16

Provide analysis and recommendations for key business decisions to Bupa Global Asia Pac (BG APAC) Head of Finance and CEO

- Work with the CEO, Head of Finance and Sales Heads for ongoing development and production of appropriate performance indicators to ensure right business focus
- Contribute to the development of robust forecasting for the business, feed to Bupa Global monthly forecast / annual planning processes
- Analyze financials and prepare slides to inform operational decisions
- Study monthly performance and prepare slides on other business insights (such as operating expenditure movement) for BG APAC Head of Finance and CEO
- Design and implement incentive schemes for sales team
- Prepare annual operating plan (sales target, operating expenditure target, etc.) for the Asia entity; including setting up an excel model.

II. Morgan Stanley HK - Return to Work Intern in MB&RE Finance

Sep. '15 – Nov. '15

- Perform daily/weekly revenue reporting including system upload and market news research for Merchant Banking and Real Estate Investments in Asia Pacific
- Review RMB Fund weekly cash activity
- Handle monthly closing including revenue and expense analysis, prepare expense allocation reports and journal posting
- Substantiate month-on-month Balance Sheet movements
- Help with ad-hoc financial analysis, reporting and presentation for the Business Unit and Firm Management
- Update knowledge bank and desktop manuals.

III. Boeing (Asia) Investment Ltd., HK – Financial Specialist

Oct. '11 – Dec. '12

Reason for leaving – Took a break to raise kids

- Manage payments for Indian and other Asian offices
- Manage filing of payment records electronically; Effect weekly/monthly account closing
- Test and implement accounting software and online banking system; Capture, measure and review performance metrics
- Work with India office to finalize India accounts.

IV. Univan Ship Management Ltd., HK – Finance Executive**Aug. '09 - Oct. '11**

Manage a team of over ten people, report to CFO. Key functional responsibilities include:

- Fund ship management activities i.e. request funds from ship-owners; ensure timely receipt of funds and effect subsequent supplier payments
- Manage accounting reports and cost variance i.e. ensure timely preparation and issuance of various accounting reports to clients/management/regulators; analyze actual cost variance from budget and implement corrective steps
- Ensure accuracy of field office accounts prepared by field offices' staff and manage timely funds disbursement to field offices. Univan has its head office in HK, 8 field offices worldwide and number of agents across the globe for smooth operation of vessels
- Liaise with banks to effect crew allotments across the globe; manage cash disbursement to vessel masters at different ports through agents / joining crew to fulfill on board cash requirement; handle accounts finalization with auditors; etc.

5 years of tax advisory and compliance experience in the complex Indian legal and regulatory environment

V. Ernst & Young, Mumbai - Senior Consultant, International Tax**Mar. '06 - Apr. '09**

Reason for leaving - Relocation to HK post marriage

- Responsible for work of over 5 juniors, reported to Manager/ Senior Manager/ Partner
- Diverse industry experience across Pharmaceutical, Telecom, Technology, FMCG and Private Equity
- Clients include Warburg Pincus, Novartis, CA (Computer Associates), Tata Teleservices, UPS Couriers, Colgate Palmolive, etc.

Experience includes global transfer pricing, cross border taxability of multinationals and optimizing group tax costs, investments in Indian projects by foreign companies, foreign exchange remittances / repatriation issues, due diligence, Indian tax and other regulatory compliances.

VI. S. N. Agarwal & Associates - Full-time Articleship**Aug. '02 - Aug. '05**

Handle routine compliance and advisory matters relating to corporate law and taxation.

ACADEMICS:

Year	Course	Details	Institution
2011	CFA (Level 2)	> 70% in Quantitative Management and Alternative Investments	CFA Institute, USA
2005	Chartered Accountancy	All India Rank 44	The Institute of Chartered Accountants of India
2004	Commerce Graduation	80% (Focus on Accounts, Taxation and Finance)	University of Mumbai (NM College)
2001	Higher Secondary	84.17% (Focus on Accounts and Math)	NM College, Mumbai
1999	Secondary School	85.33%	J.H. Poddar School, Mumbai