

**Saujanya Patnaik**  
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**PROFILE HIGHLIGHTS**

- Experienced Operation Analyst with 9+ years of experience in Banking and Financial domain.
- Seasoned outsourcing/off shoring professional with expertise in Client servicing and contract review.
- Responsible for review and summarization of client documents in an effective manner without compromising quality of the client documents.
- Additional 2+ years of experience as an Advocate in practice with exposure to legal analysis on various Indian judgments.
- Worked closely with senior management in projects relating to intellectual property rights.

**WORK EXPERIENCE**

**JP MORGAN SERVICES INDIA PRIVATE LIMITED, BENGALURU**

✓ Operation Analyst - 16<sup>th</sup> May 2016 18<sup>th</sup> August 2023

I was a part of the Client information & Client reporting team under J.P. Morgan Asset Management division. My role involved gathering information from JP Morgan's web-based software named "Workstation" & validating it, according to client's requirements. My basic responsibility involved coordinating with the offshore partners through calls and retention of the client's documents.

✓ CIB- Document Processing Specialist – Senior Team member - 24<sup>th</sup> November 2014 - 13<sup>th</sup> May 2016

Initially, I was a part of Document management team under Corporate & Investment Banking at J.P Morgan Chase & Co. My roles and responsibilities included reviewing and capturing data from the legal documents pertaining to clients and retaining those documents in JP Morgan database for future references. My experience also included reviewing of Prime Custody agreements, Global custody agreements, Collateral management, Equity security notes, etc. Exposure to Contract processing, data analysis and reporting.

Worked closely with the Legal Department, Finance, and IT Procurement to refine and/or define, communicate, and applied standard processes and terminology to be used when executing contracts.

Ensured corporate and legal guidelines were followed. Understood and applied US and EMEA legal provisions, and cost drivers of each contract, and forecasted what actions will impact each from a financial perspective, technical and cultural area.

Created, negotiated, and incorporated contract amendments, renegotiated the contract which were required for the organization.

Supported in the implementation Category Strategy and related operations management.

Ensured that contracts were made as per guidelines framed by the regulatory bodies of respective states.

**ANS IP MANAGEMENT SERVICES, BENGALURU**

Paralegal Associate - 1st July 2014 - 31<sup>st</sup> October 2014

**ADVOCATE, BHUBANESWAR**

(In practice) - 1st May 2013 - 15<sup>th</sup> June 2014

Exposure to Customs and local purchase tax structures

**LEXQUAL SOLUTIONS PRIVATE LIMITED, COIMBATORE**

Legal Analyst - 2nd July 2012 to 29<sup>th</sup> April 2013

## **ADVOCATE AND NOTARY, BHUBANESWAR**

Assistant - 27th March 2011 to 15<sup>th</sup> June 2012

### **CORE COMPETENCIES**

- Client Service
- Account Maintenance
- Knowledge of Equity & Fixed income products (CMAP, CTAX & CPREP).
- Teamwork, Training and Development of New joiners.
- Account Opening for Fraud Accounts.

### **ACADEMIC SUMMARY**

<b><u>YEAR</u></b>	<b><u>DEGREE</u></b>	<b><u>INSTITUTE</u></b>
2010	Bachelor's Degree in law	University Law College, Bhubaneswar
2007	B.Com (Accounting Hons.)	D.D.C.E, Bhubaneswar
2004	+2 Commerce (CHSE)	Maharishi College Of Natural Law, Bhubaneswar
2002	10 <sup>th</sup> (CBSE)	D.A.V.Public School, Bhubaneswar

### **CERTIFICATIONS / TRAININGS**

- **Post- Graduate Diploma in Cyber Laws & Cyber Forensics** from National Law School of India University, Bangalore in June, 2015.
- Pursuing **Company Secretary** course (executive level)
- **Masters program certificate in Lean Six Sigma Expert (Lean Management, Minitab, Black belt and Green Belt)** from Simpli Learn, Bangalore.
- Certificate courses
  - ✓ **Data Privacy Law in India** from Asian School of Cyber Laws.
  - ✓ **Customer Relationship Management** from Great Learning Academy
  - ✓ **Fundamentals of Digital Banking** from Great Learning Academy
  - ✓ **Cyber Crime Protection Program** from Asian School of Cyber Laws
  - ✓ **Procurement** from Cornerstone On demand foundation

### **ACHIEVEMENTS**

- Awarded with **"Star Performer of the quarter"** in 2020 for outstanding performance in client servicing at JP Morgan Services India Pvt Ltd.
- Participated in State Level Moot Court Competition in 2007-08 & 2009-10 sessions organized by Capital Law College. Awarded with Participatory Prize.

**SOFTWARES KNOWN** - MS Word, MS Excel, MS Access, MS Outlook, PowerPoint and Tally

**LANGUAGES KNOWN** - English, Hindi & Odia

**DECLARATION**

I do hereby declare that the above statements are true to the best of my knowledge & belief.

Place: Bangalore

Date:22.03.2024

Saujanya Patnaik