

Harshita Bafna

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PROFESSIONAL AND ACADEMIC QUALIFICATIONS

EXAMS	INSTITUTE	GROUP	YEAR	RESULT	REMARK	Achievements
CA FINAL	ICAI	Combined	MAY 2025	343/600 or 57.16%	3 Exemption	81 in Advanced Financial Management
CA INTERMEDIATE	ICAI	Combined	MAY 2022	429/800 or 53.64%	2 Exemption	-
CA – CPT	ICAI	-	JUNE 2018	107/200 or 53.50%	-	-
M. COM.	DAVV, Indore	-	JULY 2023	68.81 %	1 st in college	-
B. COM.	DAVV, Indore	-	JUNE 2021	76.58 %	1 st in college	Top 10 in university
12 th Std.	MP BOARD	-	MAY 2018	90.80 %	Distinction in all Subject	3rd in District, 1st in School and 95 in Math
10 th Std.	MP BOARD	-	MAY 2016	87.50 %	Distinction in all Subject	3rd in tehsil and 98 marks in Math

WORK EXPERIENCE

KAKANI & COMPANY, RATLAM (one of the largest firms in Ratlam District)

(FEB 2020 – FEB 2023)

Direct Taxation

- Led and executed over **300 tax audits** with accurate e-filing of **Form 3CD** for non-corporate clients.
- Prepared and filed **Income Tax Returns** for diverse entities, including individuals, HUFs, firms, and private companies across wholesale, retail, and commodities sectors having turnover between 5 Lakh to 2 Cr.
- Handled **TDS/TCS** compliance and return filing for individuals, firms, and non-profit entities, ensuring timely submissions and accuracy.

Auditing and Assurance

- Led central statutory audit for UCO Bank in the Bhubaneshwar Zone, ensuring compliance with RBI and Internal audit standards.
- Conducted branch statutory audits for multiple Bank branches, Including **currency chest branch of SBI with the currency limit of ₹500 Cr.**
- Executed audits of various branches of School named Saraswati shishu mandir registered under Section 12A, ensuring compliance with applicable laws and regulations.
- Performed over **120 Tax Audit** in a single audit cycle for various entities including Individuals, HUFs, Partnership Firms and Private Ltd Company having **Turnover up to 20 Cr.**
- Acted as **team leader** for both bank and tax audit assignments, managing audit planning, execution, and reporting.

Finance and Accounts

- Drafted comprehensive **loan project reports and financial forecasts** to support client funding proposals.
- Prepared yearly **financial forecasts and budget models** to assess business growth and funding requirements.

JOB SIMULATION / PROJECTS - Forage

- Bank of America – Investment Banking** : Performed **SWOT analysis, Built DCF and comparable company analysis models** to evaluate investment opportunities, and target company profiling - created pitch deck and financial summaries.
- KPMG (US) – Advisory** : Conducted data cleansing and Excel-based visualization; used GenAI for client-focused research and recommendations.

SKILLS AND CERTIFICATIONS

Technical Skills	Word, Excel, PowerPoint, SAG Genius, Tally ERP 9, MS Power BI, Azure Data Studio (SQL) and CBS
Core Competency	Audit, Ind AS, IFRS, US – GAAP, Financial Accounting, Financial Analysis, Taxation and Data Analytics
Soft Skills	Quick Adaptability, Analytical Thinking, Disciplined, Multi-tasking, Team Player, Good Interpersonal Skill, Thrives Under Pressure
Certifications	<ul style="list-style-type: none">Power BI (Data Analytics with Power BI)The complete financial analyst courseThe complete investment banking courseSQL for financial analysis and reportingAI tools workshop by Be10x

ACHIEVEMENTS and REWARDS

- Actively managing a ₹4.5 Lakh personal investment portfolio, applying analytical insights and market research.
- Designed PowerPoint presentation for **Higher Education** (E-content lecture)
- CA-CICASA committee member** (2021-22)
- Awarded as "**The star article of the year**"
- Star player (Female)**, annual sports day 2015
- Chess winner** at CICASA branch level