

JAY PATEL

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FINANCIAL ANALYST • COMMERCIAL UNDERWRITER • DATA ANALYST

Proven Finance and Portfolio Management expert with over 5 years of experience in Financial and Management Consulting, optimizing outcomes and results using strong analytical and statistical skill sets. Focus and passion for Corporate Finance, Risk Management, and Credit underwriting and appraisals, excellent inter-professional communication, and exceptional negotiation skills.

Financial Statement Analysis
Financial Accounting
Deal Structuring
Financial Reporting

Data Management
Financial Data Modelling
Financial Budgeting
Strong Communication Skills

Market Analysis
Strategy Management
Financial Forecasting
Strong Presentation Skills

EDUCATION

CFA- Level 1 Candidate

Master's in Finance (Concentration - Risk Management) – (2022 - 2023) - GPA 3.67
Stuart School of Business (Illinois Institute of Technology) – Chicago, IL

Bachelor's in Commerce

BYK College of Commerce (University of Pune) – Nashik, India

PROFESSIONAL EXPERIENCE

Manager – Corporate Finance

12/2021-09/2022

TATA CAPITAL FINANCIAL SERVICES LTD, INDIA

Relationship Management of Corporate Finance clients using Salesforce and CRM.
Commercial Underwriting of proposals with Financial Statement Analysis, writing proposal notes, and presenting them to Committees. Preparing a graphical representation of financial budgets and forecasts for companies using tools like SQL and Power Bi.

Manager – Small & Medium Enterprises

09/2018 – 12/2021

ADITYA BIRLA FINANCE LTD, INDIA

Portfolio Management of Corporate Finance clients using Salesforce and CRM. Coordinating with credit rating firms to get latest rating rationale and company valuations for risk assessment. Underwriting proposals with Financial Statement Analysis and presenting it to Committees. Preparing a graphical representation of financial budgets and forecasts for companies using tools like SQL and Power Bi.

Manager – Business Banking

09/2016 – 12/2017

IDFC FIRST BANK LTD, INDIA

Relationship management of business banking clients with working capital requirements. Increasing portfolio by acquiring new clients to bank. Arranging finance to clients in foreign currency based on organizational goals and foreign countries they trade with. Led and managed foreign trade policy trainings for newly joined and existing employees.

PROFESSIONAL AFFILIATIONS

Team Leader (Real Estate Division)- Stuart Investment Club

08/2022 – 12/2022

Volunteer (Education Advisory Group) – CFA Chicago Society

01/2023 – Present

CERTIFICATIONS

- Power Bi – PwC Switzerland.
- Corporate Analyst Development Program (CADP) – JP Morgan Chase & Co.
- Commercial Banking Experience Program – JP Morgan Chase & Co.

TECHNICAL PROFICIENCY

- Microsoft Office Professional Suite: Word, Outlook, Access, Excel, PowerPoint, teams
- Python and SQL
- Microsoft Project & SharePoint, Power BI