

## MAITREE MANIAR

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### FINANCIAL ANALYST

Strategic and Analytical Financial Analyst with 8 years of experience in financial modeling, forecasting and, coordinating ERP Implementation in Financial & IT services. Proven technical & leadership aptitude at increasing revenue and productivity through detailed cost analysis and excels in high pressure environment. Well versed in developing solid partnership with clients, peers and presenting to executive staff and driving cross-functional collaboration across varied organizational subcultures, and global teams. Strong business acumen in Investment advice, financial planning, Retirement advice and Lifetime income. Skilled in Python, Pandas, SQL, Tableau and Power BI with a recent certificate in Financial Technology from the University of North Carolina, Charlotte.

### TECHNICAL SKILLS:

**Finance Courses:** Corporate Finance (Planning & Analysis), ERP Implementation (Oracle Hyperion Planning), Budgeting & Forecasting, Regulatory Reporting, Balance Sheet Review, Financial Modeling, Accounting Principles (IFRS), Data Analysis, Data Visualization

**Tools & Technologies:** Hyperion Financial Reporting (FR), Hyperion Planning & Essbase, Wands (Excel4Apps), Python, Pandas, Tableau, Power BI, MS Office Tools, SQL, JIRA, Sharepoint, Agile Methodologies

### PROJECTS

#### **BLOC\_HOME**

Designed and coded decentralized app for real estate transactions. Buyers and sellers execute smart contract based transactions using blockchain (Tokenized real estate assets) with minimal cost ([https://github.com/maitree7/BlocHome\\_DeFi](https://github.com/maitree7/BlocHome_DeFi))

#### **MIND\_BOT**

Developed an Algorithmic Trading Bot that has ability to generate and execute buy / sell signals in financial markets (Cryptocurrency). Implementing 6 algorithmic trading strategies (Technical Analysis), Backtesting and Optimizing (Risk & Rewards Elements – Sharpe Ratio) using Python, Dash and deploying it using Flask ([https://github.com/maitree7/Mind\\_Bot\\_Algorithmic\\_Trading](https://github.com/maitree7/Mind_Bot_Algorithmic_Trading))

#### **PORTFOLIO\_OPTIMIZATION**

**Apr 2020**

Developed Portfolio Optimization Tool on Stocks, Metals & Cryptos, based on customer risk tolerance, helping users to estimate retirement date based on the financial outcomes using Python, Panel dashboard & Widgets ([https://github.com/maitree7/Cryptos\\_Metals\\_SP500-Hedge](https://github.com/maitree7/Cryptos_Metals_SP500-Hedge))

#### **VOLUNTARY SERVICES**

**Sept 2019 - Present**

Volunteering Living Savior Lutheran Preschool Board in Budgeting & forecasting, restructuring of fees resulting increase in revenue by ~10% annually

### PROFESSIONAL EXPERIENCE:

#### **Financial Analyst**

**IBM India Pvt Ltd, Bangalore, India**

**Jun 2010 – Mar 2016**

- Synthesized & analyzed financial performance and formulate strategic and action plans for business improvements for Venue & Hospitality Management unit in Middle East (\$300M)
- Drove the annual budget processes including Mid-Year Review, target setting and year end performance matrix. Running separate performance matrix for each event/location/asset at the driver level (>250 Mega Shows & Events)

- Guided the ERP, Hyperion Planning & Business Intelligence implementation for defining business requirements, codes mapping & testing from the finance side. Ensured the system readiness for model inputs and confirmed on information loaded in the system accurately
- Monitored & controlled Capex payments (initiatives and investments). Operated project schedules & plans for implementation of Project Costing in Hyperion Planning for Capex & Events Management
  - Recipient for the IBM Top Talent Award for outstanding performance leading to an effective Hyperion solution incorporating user needs of converting Excel based Budgeting & Forecasting Process to Hyperion-Planning
- Introduced new taxonomy for Order to Cash process across >30 clients, updating the new metrics, unit of measurements in IBM Cognos TM1 and guiding the teams to input data accurately in compliance with the line of business (LOBs) and accounting procedures
  - Recipient of the Super Talented Achiever Award (IBM Star) for implementing new taxonomy and generating new metrics in short time of ~ 3 months
- Facilitated tracking over relevant KPIs on strategic initiatives or projects to ensure appropriate risk management to business and improving forecast accuracy to +/-5%
- Ensured the implementation of US Generally Accepted Accounting Principles (US GAAP), Sarbanes-Oxley (SOX) and assisted with the preparation of Securities and Exchange Commission (SEC) filings

#### **Assistant Manager**

**Innovision Components (I) Pvt Ltd, Bangalore, India**

**Mar 2009 – Jun 2010**

- Developed & communicated performance against key financial and operational metrics monthly, shared specific drivers for variances & trends, lead to recommendations & action plans for future improvement
- Constructed complete Monthly and Quarterly financial statements, Cash Flow, Ratios, Record keeping and Related Party Statements as per regulatory requirements and drive ad-hoc financial support
- Expanded the distribution of operational analysis reports to drive operating efficiencies and cost reductions resulting in \$100k savings p.a.
- Directed employee onboarding, payroll servicing functions involving computation of salaries, attendance, leave, fixed & variable entitlements and filing of Income Tax, Provident Fund (Retirement regulations), TDS, and other statutory returns for >40 employees across India
- Streamlined the entire divisional internal reporting process and improved timeliness of monthly close schedule from 20 days to 7 days
- Coordinated for improving processes around financial control activities, accruals, spend governance, cost bookings, error root-cause and correction. Offered recommendations and documenting scope that outline the execution of system enhancements, new reporting, and process changes

#### **CERTIFICATES**

**MCSA: Power BI Reporting** (Mar 2020)

**International Financial Reporting Standards (IFRS)**

*The Institute of Chartered Accountants of India – New Delhi, DE, India*

#### **EDUCATION**

**FinTech Certificate** (Sept 2020)

*University of North Carolina, Charlotte*

**Chartered Accountant (CA): Accounts & Finance**

*The Institute of Chartered Accountants of India – New Delhi, DE, India*

**Master of Science: Computer Application & Information Technology**

*KS School of Business Management – Ahmedabad, GJ, India*