RAHIL BHAYANI
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PROFESSIONAL SUMMARY:

- A Business Analyst with 6+ years of experience in Wealth Management, Brokerage, Portfolio Management and Financial services.
- Sound knowledge of asset types like Equity, Bonds, Mutual Funds, ETFs, ABS/MBS securities, Options, Swaps.
- Extensive experience in various Software Development Life Cycle (SDLC) Methodologies including Agile and Waterfall.
- Experience in requirement gathering, process mapping, product development, and implementation planning.
- Prepared Business Requirement Document (BRD), Functional Requirement document (FRD), Use Cases, and User Stories.
- Sound knowledge of asset types like Equity, Bonds, Mutual Funds, ETFs, ABS/MBS securities, Options, Swaps.
- Experience in executing complex SQL queries for Data Mapping Validations.
- Demonstrated excellent stakeholder management by collaborating with portfolio managers, traders, compliance teams, IT teams, and regulatory bodies to enhance financial systems.
- Proficient in creating wireframe and process flow diagrams to document the AS IS and TO BE systems.
- Experience in conducting GAP analysis to identify any deficiency in the existing system and develop a solution.
- Strong analytical and problem-solving skills ability to identify the root cause of issues and propose possible solutions or improvements.
- Hands-on experience in writing test plans, test cases, UAT scripts, regression testing, and tracking defects in JIRA and Quality Center.
- Proficient in tools and technologies, including MS SQL Server, JIRA, NICE Actimize, Tableau, Bloomberg Terminal, Confluence, and the MS Office Suite, which includes Excel, Visio, and PowerPoint.

TECHNICAL SKILLS:

SDLC Methodologies: Agile Scrum, Waterfall

Business Management Tools: MS Office Suite (Access, Excel, Word, PowerPoint, Outlook, SharePoint, MS Visio, Adobe Acrobat Suite, JIRA, NICE Actimize, Tableau, Quality Center

Data Warehouse Tools: MS SQL Server

Training: Level 1 Anaplan Modeling

Licenses: Securities Industry Essential (SIE), Series 66 (pending)

PROFESSIONAL EXPERIENCE

Charles Schwab| Jersey City, New Jersey **Feb 2024 - Present**

Senior Business System Analyst

The project was based on customizing and enhancing the web portal for Financial Advisors in a Wealth Management Platform / Capital market that integrates resources and aggregates data on a mark-to-market basis, allowing Financial Advisors to conduct investment actions quickly and efficiently. This platform helps to connect Accountants and financial advisors.

Responsibilities:

- Worked extensively with Wealth Management Financial Advisors to acknowledge the business requirements by meetings, workshops, and interviews
- Coordinate with a multitude of different departments to maintain dashboard usage and data from varying reports of ever-changing data
- Communicated with business sponsors to elicit business/functional requirements and generated use cases
- Used UML diagram to write Wealth Management system model, covering conceptual ideas
- Used MS Excel and SQL Server to implement data mapping, data validation, data reconciliation and data enrichment
- Assisted Financial Advisors to conduct comprehensive reviews including asset allocation, risk management, preservation of wealth, accumulation, and wealth transfer strategies
- Worked closely with development team to verify that business needs are fulfilled, and deliverables are produced within specified budget, quality, and time
- Developed and implemented test plans and test reports, which included writing and running test cases ensuring all the functionalities are properly tested

Environment & Tools: : Agile Scrum, MS Word, MS Excel, MS PowerPoint, MS SQL Server, Bloomberg Terminal, JAD.

M&T Bank | Buffalo, New York **June 2023 – Jan 2024**

Business Analyst

The project was to add some new features along with changes in few existing features of web-based Wealth Management Platform to enhance customer's experience, to provide greater oversight and visibility and to improve overall customer satisfaction.

Responsibilities:

- Responsible for gathering and documenting business requirements, designing and modeling solutions, and working with development teams throughout system implementation and delivery.
- Communicated and collaborated with business clients to analyze functional requirements and

delivered the appropriate artifacts including business requirement documents (BRD), functional specifications, data specifications, use cases, workflow analysis, user-interface layouts and designs, test cases, etc.

- Conducted document analysis to understand economic capital calculation framework and models and gathered business requirements via face-to-face interviews and group meetings.
- Critically evaluated information gathered from multiple sources, reconciled conflicts, decomposed high-level information into details, abstracted up from low-level information to create a clear understanding, and distinguished user requests from the underlying true needs.
- Completed the business requirement documents (BRD) to establish the economic capital calculation processes.
- Supported in user-interface layouts and designs, collected feedback from clients, and made immediate modification and validation if needed.
- Assisted in User Acceptance Test (UAT), for alternative investment functionalities, providing feedback and recommendations to optimize performance and usability.
- Analyzed and reconciled the outcomes from loss estimation, and coordinated with stakeholders to identify potential issues and provide recommendations and solutions to remove problems and improve performance.

Environment & Tools: Jira, Confluence, Sharepoint, MS SQL, Oracle Toad, MS Visio, MS Project 2010, MS Office Suites 2010.

Standard Chartered Bank | Mumbai, India. **Aug 2020 – Nov 2022**

Business Analyst

Enhanced Wealth Management Platform through multiple PODs, delivering features such as improved security, new content modules, and an emotion-journey experience.

Responsibilities:

- Work closely with the Product owners & business stakeholders to capture and document business requirements, scope, prioritization, and timelines
- Create user stories with acceptance criteria in Product/Jira Backlog
- Design screen mockups for new feature to provide additional support in addition to user story
- Involved in Backlog Refinement, Iteration Planning, Iteration Retrospectives & Reviews, Iteration Demo, Daily Stand ups
- Participate in Cross Pod sync and Crew Big Room Review meeting

- Conduct pre-UAT as pseudo-user to make sure that all the user requirements are catered by the application.
- Project status reporting to management highlighting timelines, goals, dependencies, risks, and mitigation plans
- Work with Product Owner to create Project Roadmap to identify dependencies, high level timelines and release iterations
- Participate in pre-production validations for P1/P2 items.

Environment & Tools: JIRA, Business Requirement Documents (BRD), User Stories, Wireframes, Prototypes, Mockups, User Flows, Process Flow Diagrams, Excel, SQL, Wall Street Office, FX All, Insight, FX Hedge Application.

Relevant Financial Services | Raipur, India **June 2019 – Jul 2020**

Junior Business Analyst

Enhanced Portfolio Management and Accounting System to support GAAP, enabling trade capture, G/L reconciliation, NAV calculation, and generation of financial statements within an Agile Scrum environment.

Responsibilities:

- Gathered requirements from Trading Desk, Portfolio Management Department and Accounting Department to develop the trading function, portfolio management function and accounting function of the system.
- Performed pre-analysis of the user requirements, assigned priorities, and translated the requirements to functional specifications and mapped the requirements to appropriate GAAP rules.
- Designed trade-related workflow for trading flow through to the settlement and accounting systems.
- Created the detailed requirements documentation for setting the structure of the statements.
- Planning, updating and maintaining the project plans/charters and project progress reports.
- As a scrum master initiated and coordinated creating and prioritizing the Sprint Backlogs in JIRA, conducted Sprint Retrospectives and reviews, sharing metrics to identify and implement improvements.
- Provided specifications for Data Modeling, including Conceptual models, Logical models and Physical models.
- Prepared data mapping documentation using SQL for the translation of foreign currency into US dollars and matching the securities’ value into their market value.
- Prepared activity diagrams and use case diagrams using Microsoft Visio according to UML methodology.

- Maintained various versions of the documents generated during the project and managed them by incorporating the change request modifications.

Environment & Tools: : Agile Scrum, MS Visio, MS SQL Server, MS Suite (Excel, Word, PowerPoint, Project, Access, Outlook), UML, JIRA, Confluence

EDUCATION:

University At Buffalo, State University Of New York: Master's in finance – Financial Risk Management.

Pandit Ravishankar Shukla University – Bachelor of Commerce