

# Lotika Das

## Senior Finance Analyst

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### EXPERIENCE

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#### Senior Finance Analyst @ Westinghouse Electric Company

Jun 2023 – Present

- Built a SQL to Excel pipeline to consolidate historical financials and SAP data, cutting processing time by 80% accelerating forecasts and trend analysis.
- Created an AR trend visuals with Think-cell connecting excel and PowerPoint, cutting reporting time by 30% and improving leadership visibility into cash cycles.
- Reduced business planning and forecasting time by 50% for a key unit through development of a streamlined procedure, improving operational efficiency.
- Managed payroll and 500+ monthly invoices with 98% on-time accuracy; improved month-end close efficiency by 20% via SAP Ariba reconciliations.
- Designed a standardized checklist for planning and consolidation, cutting errors by 30% enhancing reporting accuracy across cross-functional departments.
- Leveraged Workiva to produce compliant financial reports, cutting reporting time by 40% and supporting faster strategic decisions.

#### Finance control Intern @ Westinghouse Electric Company

May 2022 – Aug 2022

- Analyzed financial data, monitored 50+ SOX controls, reporting violations and contributed to a 25% improvement in audit readiness and risk mitigation.
- Launched routine SOC 1 compliance assessments with cross-functional finance teams and periodic reviews with external auditors; this strengthened audit integrity and decreased reporting errors by 20% within three months.
- Monitored risk violations and deployed targeted corrective controls, optimizing resolution efficiency and achieving time savings of up to 8 hours per month.

#### Finance Analyst @ Northern Trust Corporation

Nov 2018 – May 2021

- Reconciled reports as a transfer agent for 10+ high-value clients, including Barclays and Blackrock, adhering to Financial Conduct Authority CASS7 regulations and minimizing regulatory breaches.
- Delivered tailored data solutions for audit teams, supporting 10+ audits/year and improving resolution time by 25%.
- Ensured 100% FCA-compliant CASS 6 reconciliations, supporting accurate cash flow forecasting and regulatory reporting.
- Cut data search time by 90% through implementation of an exception file, saving ~10 hours/month.
- Trained 5 team members on CASS6, CASS7, and FCA regulations, boosting compliance accuracy.

#### Accountant and senior education counsellor @ Suvigyan Career Net counselling services Pvt. Ltd.

Jan 2018 – Jul 2018

- Supervised financial performance metrics and advised senior management on key strategic decisions, ensuring alignment with company objectives and contributing to a 15% increase in overall revenue growth within the fiscal year.

#### Partner and educator @ Leading Edge Tutorial

Mar 2016 – Jun 2017

- Spearheaded personalized tutoring programs incorporating visualization techniques to simplify complex financial concepts, raising average scores by 15%.

### EDUCATION

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Clark University // Worcester, MA

Aug 2021-May 2023

Master of Science in Finance (MSF) in Quantitative Finance

### SKILLS

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**Financial Analysis:** Financial Planning and Analysis, Corporate Accounting, Accounts Payable, Financial Controls and SOX controls, Compliance, Financial Reporting, Reconciliation, Internal Audit, Business planning and consolidation, Budgeting.

**Tools & Software:** Microsoft Excel (Advanced), SAP, Tableau, Power BI, SQL R, Workiva, Prime, Ariba, Concur, Appzen, Think-cell, Teammate Audit Solutions.

**Regulatory Compliance:** GAAP, Sarbanes-Oxley Act (SOX), SEC Regulations, IFRS, Internal Auditing, Risk Management.

### PROJECTS

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**Exotic Options Analysis:** Conducted in-depth analysis of Exotic Options payouts using advanced pricing models, including Black-Scholes and Monte Carlo simulations, to assess risk and optimize investment strategies.

**Harley-Davidson Financial Forecasting:** Developed comprehensive earnings and stock price forecasts for Harley-Davidson by performing detailed stock valuation and financial analysis, providing insights into future performance trends.

**Morgan Stanley Research:** Evaluated Morgan Stanley's financial trajectory by evaluating prior 10K reports, assessing current market positioning, and determining future growth potential, culminating in an investment recommendation leveraging tools like Bloomberg terminal and pitchbook.