

Sakshi Mahadik Financial Analyst

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Profile

To work in an environment that encourages me to succeed and grow professionally where I can utilise my skills & knowledge in an organisation that recognises the value of hard work & trust me with responsibilities and Challenges.

Professional Experience

From March 2023

Associate

ATOS SYNTEL PVT LTD

Worked at Atos for AEGON, a Dutch company specializing in mutual funds, investment, life insurance, pension, and asset management. AEGON serves as a Fund Supermarket, allowing investors to diversify their money across multiple funds with the guidance of fund managers and advisers. Notably, it's a rapidly growing investment platform in the UK.

Projects -

1) **BACS (Bankers Automated Clearing System)**

- It's a regulated payment system run by Bacs Payment Schemes Limited (now Pay.UK) and is one of the most common ways that money is sent and received from bank to bank.
- In this we receive clients request to invest their money in fund
- We get their request through online top up then process the correspondence and invest them into our own funds.
- This is the process of Transfer In – Accepting clients money as a part of investment and invest them into funds.

2) **UFPLS (Uncrystallised Funds Pension Lump Sum)**

- **PRB (Pay Retirement Benefits)** In this we give service to the clients whose age is 55 or above 55.
- Provide them pension of full or partial part of their invested money.
- We receive form for their application and after the all pre checks and bank verification we process the cases in open work and send client their money through fast-pay.
- This is the process of. Transfer Out - Converting client's investment into cash and transferring to other platform.

3) **Gone Away** In this process client is marked as gone away means there is no address of the client present on the system. We send email to clients for their required documents for verification.

Key Responsibilities

Managing the work basket & work allocation, giving updates to the uk team, meeting with uk client weekly, guide juniors and solving their queries in processing.

Education

July 2019 – June 2022	Bachelors in Commerce - Graduated with 8.09 CGPI. <i>R. A. Podar college of commerce and economics.</i>
July 2017 – May 2019	H. S. C. Secured 87.38% <i>Mahatma Education Society.</i>
June 2016 – June 2017	S. S. C. Secured 87.80% <i>Mahatma school of academics and sports</i>

Awards

October 2023	Champ Award <i>ATOS / Syntel</i> Received champ award for the exemplary work and for delivering outstanding production with 100% quality.
June 2033	SPOT Recognition Award <i>ATOS</i> Received spot recognition award for performing a song on clients visit

Technical Skill & Courses

GCC-TBC Typing Course (English & Marathi 30 speed)

Advanced Tally (ERP 9.0)

Tally ERP 9 is an accounting solution that helps you to manage your accounting department.

TCS OIN Career Edge Young Professional course