Jay Thakkar

Chartered Accountant
CFA Level 2 Candidate

Contact

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IT Skills

Power BI
Tableau
Alteryx

Professional Skills

- Leadership
- Negotiation and Conflict Management
- Effective Communication and Interpersonal Skills

Linguistic Abilities

English   Hindi   Gujarati

👤 Career Objective

A finance & business management enthusiast looking to pursue career in a challenging environment that provides ample opportunity to harness my inherent skills and knowledge thereby contributing towards the growth of organization.

✏️ Experience

PwC | US Advisory | Management Consultancy | Finance Effectiveness
Associate – 2 (Apr 2021 to Present)

Working with PwC Acceleration Centre of PwC US on various projects like **Finance Transformation Project**, Contra Visioning Project, **Finance Data Strategy**, Statutory Remediation Project, etc.

Led the **stabilization workstream** to develop data aggregation & transformation workflows to **automate** Month End Consolidation for a global TMT client.

Conducted **design workshops**, understood business requirement and developed **Alteryx** based automations to help a leading Financial Services' client to streamline their segment profit data and cost allocation data for analysis.

Created an Alteryx workflow and **Power BI dashboard** to showcase the results of the survey conducted and dig deeper into the data for further analysis and recommended course of action.

PwC | Assurance - India
Intern / Specialist (Aug 2017 to Feb 2021)

Internship with network firm of PwC mainly included **Statutory Audit**, Limited Review, Group Reporting, Audit under Fiscal Laws, Specified procedure and other certification of domestic and multinational companies.

Played instrumental role in the disclosure requirements of first time Adoption of **Ind AS** in the Financial Statements and implementation of Internal Control Framework (**IFCFR**) based on COSO Framework as per the requirements of the Companies Act, 2013.

Involved in **merger transaction** of one of the clients in the Shipping and CFS business and was responsible for accounting, legal and taxation aspect of the same. Also was a part of process of consolidation of financial statements of the same.

Obtained detailed understanding of Container Freight Station Business **(CFS)**, Direct **Feeder Systems** Business, **NVOCC** Operations Business as a pert of the engagement performed on the client.

Identified **misstatement** in Revenue FSLI in one of the client wherein turnover was overstated due to target pressure from Group Company which led to **qualification** of Audit Report.

Gained working knowledge of different **ERP Software** like Tally, SAP etc.

Achievements

- Secured 2nd Rank in Commerce Olympiad
- Secured Highest Marks in Gujarat State in Common Proficiency Test of ICAI
- Received Dazzling Debut award from PwC Assurance
- Best Presenter of the Batch Rank #3 in AICITSS-MCS Training

Education

CFA Level I | CFA | Feb 2022
Score : NA

CA Final | ICAI | Nov 2020
Score : 59 %

IPCC | ICAI | May 2017
Score : 64 %

CPT | ICAI | June 2016
Score : 94 %

B.Com | GLS University | 2019
Score : 6.91 CGPA

XII | St. Kabir School | 2016
Score : 89 %

X | St. Kabir School | 2014
Score : 90 %

Online Courses (Pursuing)

Investment Banking Course (- 365 Careers)

This helped learn the subtleties of Initial Public Offerings, Seasoned Equity Offerings, Private Placements, Bond Issuances, Loan Syndications, Securitizations, Mergers & Acquisitions, Restructurings, Trading Instruments, Asset Management Vehicles and different valuation techniques of Financial Modelling

Derivative Portfolio Trading (NSE | SSEI)

This mainly includes a portfolio of derivative (future and options) securities with varied strategies designed to exploit one anomaly at a time while shielding from other exposures.

Complete Data Science Bootcamp (- 365 Careers)

It encompasses a wide range of topics like Understanding of the data science field and the type of analysis carried out, Mathematics, Statistics, Python, Applying advanced statistical techniques in Python, Data Visualization, Machine Learning and Deep Learning.

Business Intelligence Analyst Course (- 365 Careers)

It comprises of several modules like Introduction to Data and Data Science, Statistics and Excel, Database Theory, SQL, Tableau and SQL + Tableau which helps to perform several real-life Business Intelligence tasks.