

Maheshkumar Anakhiya

Email Id: [mahesh.anakhiya@gmail.com](mailto:mahesh.anakhiya@gmail.com)

Contact # + 91 9974278270

## Synopsis

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- To achieve excellence in my field through my hard work and devotion
- To obtain a position that will enable me to use my strong psychological skills, educational background and ability to work well with people

## Specialization

Nielsen Integration Service Platform/ Data Statistics / Data Collection / Mortgage specialist/ Escrow analysis / Tax specialist / Quality analyst / Customer service / Canadian Tax Preparer / Asset Management tools / Data Accuracy / MIS Reporting / Project Management / Lean Six Sigma / Team Handling / KPI Reports / Availability Reports / Supply Chain Management / Project cost management / Custom Report creation / Wealth Management / Mainframe / Research Analyst / Process improvement / Answers Desktops / Fund segregation / On us and off us refinance / Citrix / Finance analyst/ Quick book records / Account receivable / Accounts Payable

## Professional Experience

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### Moksh Tech

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Senior Data Research Executive – (Dec' 21 - Present) – Ahmedabad, Gujarat, India

#### Roles & Responsibilities:

- Doing data research for the US based client in Moksh Tech
- Checking the data for the quality of Material and Color as per client's instruction
- Estimating and analyzing its price based on the clients' quotes
- Maintaining time for the installation on daily basis and we also keep records on the fleet
- Making reports as per the data and invoices we receive from clients
- Entering data in to Moraware and SPS software provided by client
- Getting plans from CAD team and as per the plan we make unit matrix of the production and construction and also execute all plans
- Preparing quick books and invoices for the client
- Doing entry for Accounts receivable and payable in quick books
- Doing Data mining and contact new companies to get new business from other clients

### Canada Life Assurance Co

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Client Service Specialist (Wealth Management) – (Jan' 21 - Mar' 21) - London, Ontario, Canada

#### Roles & Responsibilities:

- Uploaded client's email request with documents into OnBase software provided by Canada Life Assurance Company
- Prepared applications for client's as per the request

- Checked the status of the applications whether it is financial or non-financial
- Checked its service term, transaction type, and status of the documents
- Worked on the Mackenzie Mainframe System provided by Canada Life Assurance Company
- Added funds into clients account as per the client's email and request
- Added Beneficiaries, Trustees and Successor holders
- Worked on different kinds of applications; TFSA, RRSP, Non-Registered,
- RRIF, LIF, LIRA, LRIF, PRIF

## Concentrix

Customer Service Advisor – (Sep'20 - Oct' 20) - London, Ontario, Canada

### Roles & Responsibilities:

- Answered incoming inquiries of Roger's Business and Regular customers
- Engaged with clients in a friendly and professional manner while actively listening to their concerns
- Offered support and solutions to customer in accordance with the company's customer service policies

## PricewaterhouseCoopers

Tax, Compliance Specialist (Finance) – (Feb' 20 - May' 20) - London, Ontario, Canada

### Roles & Responsibilities:

- Prepared Personal (T1) and Trust (T3) Tax returns
- Prepared reconciliation of reader files and correlations to financial statements and source documents
- Collected and organized additional supporting documentation and responded to tax authority notices and decisions
- Identified outstanding information on files, and reached out to the client's engagement team as necessary to complete work assignments
- Reviewed tax returns for data accuracy and filed Canadian tax returns

## Tata Consultancy Services Limited.

Financial Quality Analyst (Senior Process Associate) - Aug' 13 - Apr' 18

Garima Park, Gandhinagar, Gujarat

### Roles & Responsibilities:

- Started working as a Financial Quality Analyst (Process Associate) for Mortgage Banking Operations (MBO-Client Care) and Special loans in Tata Consultancy Services
- Responsible for reviewing special loan transactions including P&I Re-Cast, on us and Off us Refinance done by the team, mortgage real-time payments and processing, and postings, and provided feedback to them on the errors found
- Oversaw and coordinated day-to-day escrow processing such as acting as an intermediary between different parties, determining the requirements, and completing real estate escrow transactions and thereby helping the borrowers to secure their real estate financing to pay-off mortgages by validating the tax and insurance amounts and disbursement dates with the closing document

## Awards and Achievements

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- Participated in Kaizen and green six sigma belt event for the continuous process improvement
- Achieved Business process service champion league team award by Tata Consultancy Services Ltd
- Awarded star performer of the month in Oct 2016
- Service and Commitment award for completing 3 Years in TCS Aug 2016

## Educational qualification

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**Business Management – International Business** (Accounts and Finance) **April 2018 - Dec 2019**

Lambton college of applied arts and technology  
Sarnia, Ontario, Canada

**Bachelor of Commerce** (Honors in Accounts and Finance)

**June 2010 - April 2013**

C.U Shah Commerce College  
Ahmedabad, Gujarat, India

## Skills Information

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### Soft skills

- Dynamic
- Calm
- Positive attitude
- Versatile
- Quick Learner

### Technical Skills

- Ms. Office
- Citrix
- Outlook
- Moraware and SPS
- Project Management
- Tax software
- NISP & Answers Desktop
- Wealth Management tools

## Personal Information

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Date of Birth	1st Nov, 1991
Gender	Male
Marital Status	Single
Nationality	Indian
Language known	English, Hindi, Gujarati
Area of Interest	Research, Project Management, Problem Solving, Tax and Financial analyst, Team lead

I hereby declare that the information given above is true and to the best of my knowledge.

Maheshkumar Anakhiya