

AKSHAY BHATOA

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A postgraduate with an upbeat finance and management skills. Looking for a challenging opportunity to gain valuable exposure to financial practices, and explore my skill-sets and knowledge, to effectively deliver assigned responsibilities and contribute to organizational growth along with personal development.

PROFESSIONAL EXPERIENCE

BEFREE BUSINESS RESOURCING LLP. Gandhinagar, Gujarat

PARAPLANNER (AUSTRALIAN FINANCIAL PLANNER) (Joined September 2019)

- Preparing financial planning analyses and documentation for Financial Advisers.
- Providing technical and administrative assistance to the Financial Advisers.
- Completion of compliance documentation to ensure 'best interest duty' is met.
- Research and implement compliance standards.
- Performing and comparing different financial modelling and scenario analysis.
- Working on the financial strategies like Retirement Analysis, Cash flow Management, Debt Management, Insurance, Gearing.
- Preparing portfolio analysis, investments research and providing fund reports.
- Generating financial reports and presenting to the Financial Advisers.

TECHNICAL SKILLS

- Microsoft Office - Advanced Excel, Word, PPT
- Financial Modelling, Debt Management, Retirement Analysis
- Software - XPLAN, COIN and AdviserLogic

INTERNSHIPS

NORTHERN ARC CAPITAL LTD. Chennai, Tamil Nadu

FINANCIAL DATA MANAGEMENT (Nov 18 to Jun 19)

- Entity Financial Data Analysis.
- Risk Analysis of Clients.
- Suggestions for improvements and making user friendly company's in-house developed FIS (Financial Information System).
- Consolidation and Reconciliation of all Direct Origination Loans.

FR8 LOGISTICS PRIVATE LTD. Chennai, Tamil Nadu

RISK AND OPERATIONS

- Tracking and Calculating process TAT for client's transportation of supply from sourcing point to destination point.

- Handling client's in-transit related issues.

EDUCATION & CERTIFICATION

- **Master in Business Administration**, Sathyabama Institute of science and technology, India.
Finance and Operations (2017 - 2019).
- **Bachelor in Commerce**, University of Madras, India
Accounting and Finance (2013 - 2016).

ACHIVEMENTS & AWARDS

- Participated in **"Guinness World Record"** event of the most people transplanting seedlings.
- **Coordinated** with Incredible India Tie-ups for Academic Collaboration between India and Indonesia (Event Management).
- Coordinated in TIE-CON (Entrepreneurship Conference) with Edsix Brain Lab Pvt. Ltd. for **Product Launch** held in ITC Grand Chola, Chennai.
- Represented college department at departmental matches in football and basketball.
- Represented School at Cluster and Regional level in cricket.

PERSONAL DETAILS

Father's Name: Mr. Vivek Kumar

Birthday: March 23, 1996

Permanent State: Himachal Pradesh

LinkedIn: <https://www.linkedin.com/in/akshay-b-0b6b3289/>

Declaration

I, Akshay Bhatoa, hereby declare that the information contained herein is true and correct to the best of my knowledge and belief.

Akshay Bhatoa