



Tarun Lakhiani

US-CMA (SEMI-QUALIFIED PART 1)

Details

Ahmedabad, India

9408446362

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Skills

Leadership Skills (Team Management & Training)

Financial Planning & Analysis (US GAAP)

Cost Accounting/Management

Internal Controls

Planning, Budgeting, and Forecasting

Account Management

Statistical Analysis

Capital Budgeting

Risk Analysis

Valuation/Pricing

Corporate Restructuring

Financial Statement Analysis

Profitability Analysis

Creativity & Problem Solving

Links

Visit My LinkedIn

<https://www.linkedin.com/in/tarun-lakhiani>

Profile

Certified Management Accountant (US-CMA) possessing a comprehensive understanding of all aspects of accounting and financial planning & Analysis. (I cleared CMA Part 1 in the month of Feb 2023 - 1st Attempt. I'll appear for my Part 2 in the month of June. Looking forward to applying all my new learning in my next role).

Servant leader with the ability to lead and manage teams effectively while making a remarkable difference.

Certifications

Tax Virtual Experience Program, Pwc

APRIL 2023

Over the period of April 2023, I completed practical tasks in:

Chart of Account Mapping

Book-To-Tax Differences

Calculating Taxable Income

Fit Energy's Tax Summary and Analysis

US-CMA, IMA (Institute of Management Accountants)

JUNE 2022

P1 - Financial Planning, Performance, and Analytics:

A. External Financial Reporting Decisions

B. Planning, Budgeting, and Forecasting

C. Performance Management

D. Cost Management

E. Internal Controls

F. Technology and Analytics

Employment History

Sr. Business Development Specialist at Turabit LLC, Ahmedabad

MAY 2022 — PRESENT

- Drove email acquisition and marketing campaigns. I came up with a new initiative of Video Outreach which helped the team and my colleagues with a 20% increase in response rate from new/existing prospects.
- **Utilized natural language processing algorithms** to classify customer feedback.

Financial Planning, Analysis, and Accounting at Self-Employed, Ahmedabad

OCTOBER 2021 — NOVEMBER 2022

- **While this was a Non-Corporate experience in the informal Textile industry**, it taught me a lot about FP&A and how it impacts the business in real-time.
- **Budgeting and Forecasting** done for upcoming quarters based on estimated sales and expense figures.
- **Their main pain point was to stay prepared for the capital requirements and purchasing budget** throughout the year which is where I came in and helped with preparing the Forecasting and

Budgeting models.

- Monitored & Managed bookkeeping for both firms with the help of 2 Associates.

Strategic Account Manager at eClinicalWorks, Ahmedabad

JUNE 2021 — SEPTEMBER 2021

- **Successfully handled 74 client accounts** and ensured that our SaaS platform works seamlessly for all of them.
- **Acted as a Liaison between departments** to ensure task completion.

Assistant Team Leader at Etech Global Services, Ahmedabad

DECEMBER 2019 — JUNE 2021

- Led a team of around **10-12 Team Members** in any given month.
- **I conducted weekly trainings** which ensured that set my Team Members were set up for success and are up-to-date.
- Coaching and nurturing the **TMs** to ensure their success in achieving the set KPIs.
- Implementing weekly **Action plans and Performance overview reports** keeping all the stakeholders updated about the Team's progress..
- My role included creating a roster for a team of approx **120-150 team** members.
- Hands-On experience with handling **International clients**.

Client Representative at Etech Global Services, Ahmedabad

JULY 2016 — DECEMBER 2019

- Handling incoming customer queries and up-selling and cross-selling client products.
- I was a Consistent top performer in sales and service.

Education

Certified Management Accountant (US - CMA), Institute of Management Accountants (IMA), Ahmedabad

JUNE 2022

CMA is a professional certification credential in the management accounting and financial management fields.

CMA Course is the highest credential in Management Accounting and requires professional training.

Bachelor of Commerce, GLS University, Ahmedabad

APRIL 2015 — JULY 2018

Accomplishments

- Cleared my CMA Part 1 Exam **in the first attempt**.
- In the course of 3.6 years, **I received 28 Top/Runner-Up Certificates** for Sales/Service at **Etech** Global Services. (The process in which I worked had 120 + reps consecutively).
- **Received 2 Top Team Certificates** in my tenure of 1.7 years as a Team Lead at **Etech** Global Services.

Additional Information

- I like to keep myself up to date with the news around Business, Start-ups, Technology, Finance, and AI space. I dedicate approximately an hour every day to reading articles and watching news videos related to the same.
- It happens very rarely, but I sketch sometimes.
- I love listening to Finance and Technology podcasts. My favorites are 'Sir Ashwath Damodaran', 'Akshat Shrivastava', 'Lapaas Voice', and 'PBD Podcast'.
- LinkedIn is one of my favorite platforms. I write extensively there, and I also publish a weekly newsletter, apart from my daily business, finance, and case study posts.