

Punita Goel

Chartered Accountant

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Phone: +8587049994

CORE COMPETENCIES

GAAP, IFRS, Controllership, Month-end closing & reporting, Statutory Audits, Preparation of Financial Statements, Consolidations, Internal Audit & ICFR, Financial Reporting, MIS reporting, Record to Report (R2R), Asset Management, Change management, Center of excellence PeopleSoft, ERP implementation, Taxation, Treasury Operations, Corporate Social responsibility, Enterprise Risk Management, Business Continuity Planning, Statutory Compliances, Retail Banking

ACADEMIC DETAILS

*Chartered Accountant - 2004
Company Secretary (Inter) - 2003
B. Com - MD University - 2000*

Certifications:

*NSDL Depository operations Module
NSDL Mutual Fund Advisory Module*

PROFILE SUMMARY

19+ years of value-based experience in controllership, financial reporting and analysis, statutory compliances & operational excellence

- **Specialized in making high-stake decisions**, resolving complex issues, providing expert advisory services and managing large-scale projects, preparation of financials, P2P cycle, Vendor management, Workflow & ERP implementation, Setting up of controls for risk mitigation/ Sox readiness
- **New Set-up Planning**, experienced in transition of new processes across multiple countries for captive set-up
- **Key Enabler**, managing business stakeholders through creation of strong interface with business functions to enable them in achieving their business targets. Thus, playing important role in business support
- **Capability Building** through **effective hiring, orientation, grooming & development and retention of staff**, possessing right mind-set & attitude for motivating & empowering a team to ensure smooth business operation
- **Result-driven, growth-oriented & focused professional** with excellent people management, planning, organization, analytical, problem-solving, communication and interpersonal skills
- **Global Exposure** Worked for global geographies like US, Philippines & Dubai

SIGNIFICANT ACHIEVEMENTS

- Established a thorough month-end process to guarantee timely and accurate completion of tasks, ensuring comprehensive coverage and precision. As a result, monthly reporting became more precise, and financial statements were prepared accurately and timely
- Successfully integrated accounting processes for acquired units, ensuring a seamless transition
- Developed and deployed a Purchase Order to Accounts Payable workflow for OGS India aimed at establishing a robust audit trail
- Instrumental in Implementing various ERPs for finance i.e. PeopleSoft, Concur and ARIBA at OGS
- Designed, developed, and implemented internal controls, **resulting in Zero non-compliance** in all ICFR, Internal Audits and Statutory Audits
- Drafted Standard Operating Procedures (SOPs) and RCM guidelines for the finance and accounts department. Played a key role in formulating finance and T&E policies

PROFESSIONAL EXPERIENCE

- Sept'12 till date: **Optum Global Solution Pvt. Ltd - Director Finance**: Managing controllership, Statutory & Internal audits, Balance sheet governance, Accounting policies, T&E Management, Process improvements & automations, instrumental in change management
- Aug'11-Sept'12: **Kotak Mahindra Bank - Branch Manager**: Monitoring portfolio performance of clients, ensured compliance with statutory requirements laid by acts governing banking regulations
- Apr'05-Aug'11: **ICICI Bank - Branch Manager**: Responsible for making branch a profit center, ensuring operational excellence, customer service & compliance with statutory requirements

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Sector 9, Faridabad, Haryana.