

CONTACT

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IT SKILLS

MS Office	
Workiva	
Workday	
Toppan	
Clearwater	
Intelligize	
PeopleSoft	
Bloomberg	
Smart Sheet	
Google Sheets	

EDUCATION

Ongoing	US CPA
2011	CS from Institute of Company Secretaries of India
2010	CA from Institute of Chartered Accountants of India
2009	B.Com. (Hons.) from St. Xavier's College, Kolkata

SOFT SKILLS

Communicator	
Analytical	
Leadership	
Numerical	
Competence	
Decision-making	

Atul Agarwal

CA, CS (Pursuing US CPA)

Experienced finance professional with a focus on SEC reporting, financial reporting, technical accounting, statutory reporting, and auditing. In search of opportunities with expertise in building finance teams, implementing accounting standards, and driving continuous improvement projects.

PROFILE SUMMARY

- Bringing **13 years** of experience in **SEC reporting, financial reporting, and technical accounting** across diverse industries.
- Currently working as Sr. Controller at Exela Technologies India Private Limited, with a proven history of collaborating closely with C-suite executives on SEC filings and ensuring the finalization of SEC filings (**10-Q, 10-K, 8-K**) under **US GAAP & SEC**.
- Committed to enhancing processes and leading continuous improvement initiatives with zeal.
- Built Finance Teams (COEs)**, passion for improving processes & driving continuous improvement projects.
- Experience in working and **implementation of accounting standards** in US GAAP/IFRS.
- Implemented various **Workiva projects** and coached other finance departments on tool usage.
- Key participant of the pilot batch responsible for migration of Financial Reporting work
- Proficient in leading and developing Finance Teams, implementing accounting standards, and driving continuous improvement projects to enhance operational efficiency and accuracy.
- Skilled in SEC reporting, financial reporting, and technical accounting across diverse industries.
- Successfully streamlined SEC reporting processes and disclosure, resulting in a saving of multiple hours annually through automation initiatives, displaying a strong commitment to process improvement and efficiency.
- Built and led Finance & Accounting Team from scratch in multiple organizations.

CORE COMPETENCIES

Technical Accounting



Process Automation



SEC Reporting



Research &



Global Team



Financial & Strategic Planning



Benchmarking



Collaboration



US GAAP/ IFRS



Audits/Compliance



Financial Analysis



WORK EXPERIENCE

Exela Technologies India Pvt. Ltd. (SourceHOV India Pvt. Ltd.) (Nasdaq: XELA), Hyderabad

Senior Controller | Sept'23-Till Date

- Finalizing SEC filings (**10-K, 10-Q**) for Exela Technologies, Inc. (**Exela**) and ensuring compliance under **US GAAP & SEC**.
- Spearhead the establishment of SEC processes and filing requirements (**10-K, 10-Q, 8-K**) for XBP Europe Holdings, Inc (**Nasdaq: XBP**), an affiliate of Exela, **recently went public** (Nov'2023) through a Special Purpose Acquisition Company (**SPAC**) transaction.
- Worked and created **technical accounting memos** for complex transactions and advising the management.
- Collaborated with cross-functional** teams to ensure compliance with regulatory guidelines and standard.
- Conducted thorough **research and analysis** to identify SEC filing obligations specific to SPAC, Smaller Reporting Companies, and other complex transaction.
- Partnering with C-suite** executives for SEC filings and accounting memos for both the listed companies.
- Managing various stakeholders including coordination with **outside legal counsel, auditors, and SOX**.
- Designed and implemented a **streamlined process** for compiling and finalizing required documentation for filing.
- Monitored changes in SEC regulations** and communicated updates to the relevant stakeholders.

Airbnb Global Capability Center Pvt. Ltd. (Nasdaq: ABNB), Hyderabad

Manager, Financial Reporting | Jun'22-Sept'23

- Orchestrated the establishment of a **robust SEC reporting process** and team for a new public listed company.
- Led the SEC reporting function in the preparation and finalization of the **10-Q, 10-K** including **MD&A** sections as per reporting and disclosure requirements under **US GAAP and the SEC**.
- Prepared the Shareholder Letter filed on **Form 8-K** and related **supporting analysis for Analysts' call**.
- Streamlined the current SEC reporting processes** and disclosure.
- Led the **statutory reporting function** and managed the finalization of FS including Audit closure for **30+ entities across EMEA & APAC** region using **IFRS/FRS 102**.
- Streamlined the function by standardizing approach across regions, automating Workiva and supporting files, automating STAT adjustments through Alteryx, flux commentary and other initiatives.
- Managed monthly/ quarterly management reporting process including preparation of Cash Flows, BS, IS, significant transaction, along with Flux commentary for MoM, QoQ & YoY basis.

Highlight:

- Drove multiple initiatives which saved **1,000+ person-hours annually**.

Franklin Templeton International Services India Pvt. Ltd. (NYSE: BEN), Hyderabad

Supervisor, Financial Reporting | Dec'18-May'22

Senior Accountant, Financial Reporting | Oct'16-Nov'18

- Built the SEC Reporting COE** in Hyderabad and migrated 100% preparation work and major review tasks.
- Led the SEC reporting function in the preparation and finalization of the **Form 10-Q /10-K**, including MD&A sections, FS, Cash Flow and Notes to accounts, as per requirements under US GAAP and the SEC.
- Prepared the **Earnings Release (8-K)**, Earnings Release Commentary, and related supporting for Analysts' call.
- Participated in the **transition & integration of acquired companies (Legg Mason – one of the biggest acquisitions)**.
- Engaged in **implementation of new US GAAP accounting standards** and managed accounting issues.
- Led and implemented **Workvia projects** and coached other Finance Departments on the usage of the tool.
- Prepared **Form 11-K** for 401K Plan and Form 5500 filed to DOL.
- Reviewed and finalized the **iXBRL for 10K /10Q /8K filings** as per SEC requirement.
- Calculated **EPS and Non-GAAP** measures in accordance with US GAAP forming part of monthly CFO binder.
- Reviewed Financial Statements** of various subsidiaries in accordance with local GAAP and company guidance.
- Participated in the **quarterly impairment analysis** and preparation of quarterly impairment presentation for CFO.
- Managed external **auditors' queries** and ensure in timely completion of audit including **SOX compliance**.
- Participated in the **RPA project** for streamline of manual processes.
- Performed **peer review / benchmarking** to track the disclosure changes in the peers' SEC filings.
- Developed and updated the **accounting policies & procedures** for the company.

Highlights:

- Awarded as the “**Most Inspirational Idea**” out of more than 100 ideas submitted across the globe.
- Led the **Idea initiative program** for SEC reporting function and part of exclusive ISC – Blockchain group.

EY Global Delivery Services India Pvt. Ltd., Bangalore

Assistant Manager, Assurance Team | Oct'15-Oct'16

- Managed a portfolio of engagements and supervised the **Audit for US-based financial service and e-commerce** clients using US GAAP.
- Contributed to **delivering technical and soft-skills training**; participated in recruitment of seniors and staff.
- **Led a team of seniors and associates** and reviewed their performance.

Standard Chartered Bank – Scope International Pvt. Ltd., Chennai

Associate Manager, Financial Reporting | Dec'14-Oct'15

- Reviewed and timely delivered quarterly Financial Statements for US, Brazil, and Canada region branches & subsidiaries using **IFRS and Group Accounting Policies**.
- Performed variance analysis, transactional level review and comparison to prior period.
- Reviewed **Country Exposure Reports** to report the quantum of exposure in different countries, along with variance analysis and submitted the same to the regulators (Bank of England).
- Migrated entire monthly activities including reporting packages from US to Chennai office.
- Participated in the **IFRS Automation project** for FS preparation & relevant schedules on a quarterly basis.

WNS Global Services Pvt. Ltd., Chennai

Assistant Manager, Financial Reporting | May'14-Dec'14

- Key participant of the **pilot batch for migration of Financial Reporting** work of one of the largest insurance firms in US.
- Managed preparation of financial statements using US GAAP, Budgeting Forecasting, Investment Reporting, SEC Filings, and other relevant activities.

HSBC Global Resourcing, Kolkata

Fund Accountant, Financial Reporting | April 2011 to February 2014

Assistant Manager, Financial Reporting | Mar'14-May'14

- Prepared and reviewed financial statements for Hedge Funds, Mutual Funds under Standalone or Umbrella Structure using **US GAAP/IFRS**.
- Managed the audit process, participated in book closing activities and prepared the **Statement of Distribution** for all the funds.
- Actively participated in the Operation Model Review project, for more efficient processing of funds.
- Key participant of the pilot batch for migration of Financial Reporting work.

ARTICLESHP TRAINING

A Ray & Associates and Sanjay Agarwal & Co. (April 2007 to October 2010)

PERSONAL DETAILS

Address	: Aparna Cyber Commune, Hyderabad, 500019
Date of Birth	: 18 th November 1988
Languages Known	: English, Hindi
Nationality	: Indian
US Visa	: Valid B1/B2 Visa till Mar'2029
Marital Status	: Married