

CA Padam Bhansali

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EDUCATIONAL & PROFESSIONAL QUALIFICATIONS

COURSE	YEAR	INSTITUTION	MARKS	REMARKS
CA Intermediate	Nov 2023	ICAI	434/800	Exemption in 2 subjects
CA Foundation	July 2021	ICAI	272/400	Exemption in 3 subjects
B.Com (Honors)	2021-2024	St. Xavier's College, Kolkata	8 CGPA	Ranked 6th best college in India by NIRF 2024
Class XII	2021	DAV Public School	481/500 (96.2%)	Rank 1 in school
Class X	2019	HMS	476/500 (95.2%)	Rank 2 in school

WORK EXPERIENCE

Article Trainee | Kothari Jain Patil and Associates

April 2024 – Present

During my Articleship, I gained valuable experience working with two distinct **offshore clients**, focusing on diverse financial and accounting challenges:

Client 1: E-Commerce Business

- Developed a detailed **Management Information System (MIS)** report and an **interactive dashboard** in Excel, delivering actionable insights for informed decision-making.
- Conducted a comprehensive **analysis of marketing expenditure returns** across multiple countries by preparing monthly reports that outlined expenses on channels such as **Google, Facebook, X, Snapchat, TikTok and Pinterest**, and evaluated the corresponding revenue generated, utilizing the e-commerce analytics tool **Triple Whale**.
- Identified cost-saving opportunities by preparing **weekly reports** on major cost centers, facilitating a **cost reduction by 10%**.
- Managed the entire accounting process by seamlessly integrating sales data from **Shopify to QuickBooks** via **A2X**, establishing **transaction categorization rules**, performing monthly **bank reconciliations** for five accounts, and maintaining compliance with accounting standards through meticulous **financial recordkeeping**.

Client 2: Credit Repair Organization

- Developed reports on **budgeting, cost management, and factoring**, providing critical insights to support **financial decision making**.
- Ensured **data integrity** by generating comparative reports to **identify discrepancies** between systems, collaborating with the IT team for timely resolution.
- Led the successful **migration** of accounting software from **QuickBooks to Salesforce**, customizing the **Accounting Seed** module to enhance the overall accounting process.

CERTIFICATIONS

Microsoft Power BI, Infosys

2024

- Developed skills in business intelligence (BI) for **gathering and analyzing data** to create insightful **reports, scorecards, and dashboards** in Excel, facilitating informed decision-making.
- Completed **real-world projects** using Microsoft Power BI, enhancing capabilities in **data visualization and analysis** for effective data exploration and presentation.

EXCEL Masterclass, CA Monk

2024

- Advanced proficiency in Excel, demonstrated through completing a comprehensive Excel masterclass; skilled in using **Xlookup, Index, Match** and **Power Query** for complex data retrieval.
- Expertise in utilizing **Power Pivot, VBA, Pivot Tables** and **Pivot Charts** for data analysis and visualization; and utilizing **Conditional Formatting** in to highlight key insights and data trends effectively.

ACHIEVEMENTS AND EXTRA CURRICULAR ACTIVITIES

- Awarded **3rd Prize** in 'Ace the Case', a case study competition conducted at St. Xavier's College involving corporate and retrenchment strategies, negotiations, mergers and acquisition.
- Won **1st position** in Art Fare for **Zentangle Art** of Lord Ganesha out of **80+ participants**.
- Awarded **3rd position** in Essay Writing Competition in school out of **50+ participants**.