

Jateen Solanki

Locations: Mumbai | Vadodara • Phone: +91 9619478201 • jateen_h_solanki@hotmail.com • <https://www.linkedin.com/in/jateen-solanki>

Professional Summary

Strategic finance professional with 15+ years of experience in financial planning, analysis, and enterprise-wide initiatives. Proven track record partnering with CFOs office to drive strategic priorities including cost optimization, working capital management, and digital finance transformation. Expertise in translating complex financial insights into actionable strategic narratives for executive and Board-level stakeholders. Skilled at managing enterprise projects, designing performance frameworks, and delivering clarity on key financial and operational decisions.

Skills

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| • Power BI & Power Query | • Fund Accounting and Investment accounting |
| • SQL basics | • Cash Projections |
| • Python basics | • Budgeting & Forecasting |
| • Accounting software's like WINS by FIS, MS GP Dynamics, Tally, Net Suite Web, etc. | • Process Migration |
| • MIS based Data Management & Reporting | • Financial retention analysis |
| • Financial data modelling | • Investment Banking |
| • Team management | • Fund Accounting Reconciliation |
| • Custody reporting | • Corporate accounting |
| | • Corporate financial planning & analysis |

Professional Experience

J. P. MORGAN INDIA SERVICES PVT. LTD., Mumbai, MH – *Investment banking firm*

Associate /Process Manager, 01/2024 to Present (IMOS – Transitions / Migrations)

- Led enterprise migration program transitioning \$200Crore of Asset under administration.
- Managed a 5-person team and coordinated with various international and domestic stakeholders.
- Designed and implemented automated reconciliation framework reducing manual effort by 2 hours monthly and improving data accuracy to 99.9%.
- Led end-to-end onboarding of mutual fund US, UK and ANZ regions.
- Developed executive dashboards providing leadership with real-time visibility on fund performance, cash positioning, and operational efficiency metrics.
- KPI Management of team.
- Strategic management of team budget and collaboration with controllership and treasury team.
- Led cost optimization analysis identifying 1 FTE worth savings through process consolidation and automation using power query and Alteryx.

ARCHER TRANSNATIONAL SYSTEMS PRIVATE LIMITED, Vadodara, GJ – *Legal financial service provider firm*

FP&A Analyst – Financial Planning and Analysis team in Corporate Accounting Department, 03/2022 to 01/2024

- Developed annual capital and P&L forecasts; presented to CFO and executive team for approval and strategic planning.
- Partnered with CFO to design enterprise KPI framework tracking 15+ financial metrics; implemented Power BI dashboards enabling real-time decision-making for monthly leadership reviews and quarterly Board presentations.

- Translated monthly performance metrics into quarterly business targets and variance analysis.
- Partnered with the Vice President Finance and the leadership teams, to develop the annual and long-range plan and ensure accurate and timely budget development.
- Sourced and analyzed data from multiple systems to identify financial issues and recommend solutions.
- Provided timely cashflow forecasts to the management to enhance cash planning and enhance working capital management.
- Identified and solved issues in financial reporting models.
- Collaborated with operations and sales teams on pricing strategy and revenue modeling, resulting in an overall improvement in deal margins.
- Proposed adding new & strategic analysis like revenue per employee, revenue cost ratio, revenue per invoice, financial leverage ratio, etc.
- Led NetSuite ERP implementation across US and India finance departments, improving data accuracy and reducing manual reconciliation effort. Enabling better granularity of financials and budget variances tracking.

Accomplishments:

- Developed comprehensive budget of India location for \$2Crore across departments and delivered 48 hours before the deadline and achieved 100% variance tracking accuracy.
- Created various dynamic pricing models resulting 12% margin improvements and reducing bid to close cycle by 20%.
- Created various power query-based dashboards providing revenue per employee, financial leverage metrics for monthly executive financial reviews and reporting.

J. P. MORGAN INDIA SERVICES PVT. LTD., Mumbai, MH – *Investment banking firm*

Associate /Process Manager, 01/2019 to 09/2021 – Promoted to manager from team leader

Team Leader, 11/2014 to 12/2018

Fund Accounting Onboarding (Migrations / Transitions)

- Generated NAV including P&L components of a mutual fund based in US, UK and ANZ regions
- Managed end to end onboarding of the mutual fund US, UK and ANZ regions.
- Generated various data reports providing in-depth analysis of mutual funds.
- Reconciliation of Fund Accounting & Custody generated incomes.
- Provided various reporting data to auditors as well as regulators.
- Provided detailed reports to various treasury teams managing client.
- Provided accurate cash projections of mutual funds and MIS relating to various products of the client to facilitate clients trading & investment decisions such as failed trade report, derivatives / securities collateral management reports, etc.
- Built and trained a high-performance team.
- Implemented dynamic work allocation to manage the business peaks and valleys.
- Timely issue resolutions in case of issues or errors in team.
- Ensured cross training and process backup.

Accomplishments:

- Migration of entire project worth of 5 FTE work to Outsource location, managing the end to end of the same
- Achieved various Global as well as national level awards for onboarding the most difficult clients on time and accurately
- Promoted to manager from team lead position

WILLIS TOWER WATSON GDS INDIA PRIVATE LTD., Mumbai, MH – *Insurance broking firm*

Senior Data associate, 01/2013 to 11/2014

- Reported NPS data in various forms & ways to facilitate better decision making for marketing strategies.
- Designed executive-level strategic presentations analyzing client retention financial viability; influenced refined retention strategy improving retention rate by 10% while reducing focus on 8% non-relevant clients.
- Analyzing client retention needs and the financial viability to retain the clients.
- Created PPT based decks for presenting it to senior management for strategic framework of the existing marketing strategies.
- Created Verbatim Analysis based on client responses on NPS Surveys.
- Created detailed reporting of each strategic client to Management team.
- Recommended various strategic recommendation helping to fix quicker solutions.

CRISIL LTD GAC DEPT CURRENTLY KNOWN AS S&P CAP IQ., Mumbai, MH – Ratings, *analytical and research firm*

Senior Data associate, 01/2012 to 12/2012

Data associate, 11/2009 to 12/2011

- Gathered information from various sources information about securitized assets and providing the same to clients with various parameters to analyze the performance of the same.
- Updated the asset loan-level details.
- Cross Product performance analyses of assets.
- Ensured that the data is flowing to the reporting model and is accurate.
- Provided reporting to management on timely basis on KPIs and metrics of the team.
- Built high-performing analytical teams and trained team members on process improvements.
- Implemented process enhancements and automation initiatives to improve efficiency.

Education & Certifications

MASTERS IN FINANCIAL MANAGEMENT – May 2014

N. L. DALMIA INSTITUTE OF MANAGEMENT STUDIES & RESEARCH, UNDER MUMBAI UNIVERSITY,
MUMBAI, MH, INDIA

Bachelor of Management Studies (FINANCE) – May 2009

ROYAL COLLEGE OF MANAGEMENT, COMMERCE, ARTS & SCIENCE, UNDER MUMBAI UNIVERSITY,
MUMBAI, MH, INDIA

NCFM - Capital Market Dealer Module & Derivatives Dealer Module

Corporate Awards & Achievements

Star Performer of the Month July 2025 (JP Morgan Services Pvt Ltd)

SSO top performer Q2 2025 (JP Morgan Services Pvt Ltd)

Número Uno - Best Team Player (CRISIL. LTD)

Star Performer of the Quarter Q2 2018 (JP Morgan Services Pvt Ltd)

Asia team award – Manager of the team (JP Morgan Services Pvt Ltd)