JAYVEEN PATEL

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SUMMARY

Strategic FP&A and Business Analyst with 4+ years of experience driving financial planning, budgeting, forecasting, and profitability optimization across banking and financial services. Expert at building data-driven financial models, performing deep-dive variance analysis, and designing KPI dashboards that improve executive decision-making. Highly proficient in SQL, Python, Power BI, SAP FICO, and advanced Excel, with a proven record of cutting costs, increasing forecast accuracy, automating manual workflows, and delivering insights that directly influence business strategy. Recognized by leadership for improving financial performance, strengthening cross-functional collaboration, and reducing operational inefficiencies through analytical rigor and automation.

CORE SKILLS

Financial Planning & Analysis: Budgeting & Forecasting ,P&L Analysis ,Cash Flow & Balance Sheet Analytics ,Variance & Trend Analysis ,Scenario/Sensitivity Modeling ,Financial Reporting

Data & BI Tools: SQL ,Python ,Power BI ,Tableau ,Advanced Excel (VLOOKUP/XLOOKUP, Macros, Power Query) ,SAP FICO ,Oracle Financials ,Hyperion

Business & Reporting: Executive Dashboards ,Cost Optimization ,KPI Development & Monitoring ,Ad-hoc Analysis ,Stakeholder Management

Compliance & Controls: GAAP/IFRS ,SOX ,Regulatory Reporting ,Internal Controls ,Audit Support

Process Improvement: Automation (VBA, Power Query) ,Workflow Optimization ,Forecast Accuracy Improvement ,Cross-functional Collaboration

EXPERIENCE

FP&A Analyst | Prudential Financial, TX   **Jun 2024 – Present**
- Managed a $1.2B annual operating budget for Consumer Banking, boosting forecast precision by 10% and cutting approval turnaround time by 15% through automation and streamlined workflows.
- Built integrated forecasting models using SQL, Bloomberg data, and Python, reducing forecast variance from 8% to 5% and increasing planning accuracy.
- Conducted financial deep-dive variance, trend, and cost-driver analysis, identifying inefficiencies that delivered $2M in operational savings.
- Developed multi-scenario financial models assessing interest-rate exposure, liquidity shifts, and deposit trends to guide long-term financial strategy.
- Automated 15+ recurring reporting processes (VBA + Power Query), reducing manual reporting workload by 30% and improving data reliability.
- Created executive Power BI dashboards visualizing KPIs, revenue performance, expense drivers, and forecast deviations for senior leadership and FP&A directors.

Financial Data Analyst | DMI Finance Pvt Ltd, India   **Nov 2022 – Jul 2023**
- Consolidated financial statements from SAP FICO & Oracle with 100% accuracy, supporting executive and investor reporting.
- Performed KPI and financial ratio analysis (NIM, ROA, Cost-to-Income) that drove 12% operating cost reduction.
- Improved forecast accuracy by 15% through scenario modeling and enhanced driver-based analysis.
- Automated recurring financial reports using VBA and Power Query, cutting monthly cycle time by 30%.
- Built Power BI dashboards for revenue, expense, and variance trends, improving decision-making speed by 25%.
- Ensured strict regulatory compliance (RBI/SEBI) and maintained zero audit discrepancies through strong data controls and validation.

Business Risk Analyst | HCL, India   **Jan 2021 – Oct 2022**
- Built driver-based forecasting and risk models for deposits, loans, and liquidity, improving predictive accuracy by 18%.
- Performed profitability, sensitivity, and portfolio segmentation analysis using SQL/Python, identifying high-value segments that increased engagement by 22%.
- Automated Power BI dashboards for P&L, balance sheet KPIs, and risk metrics, reducing reporting time from 2 days to 4 hours.
- Developed fraud-risk analytics with cross-functional risk teams, flagging $1.5M in high-risk transactions and strengthening controls.
- Standardized risk reporting frameworks, improving audit readiness and consistency across business units.
- Mentored junior analysts on risk modeling, dashboard design, and automation, boosting team efficiency and analytical output.

EDUCATION

Master of Science, Business Analytics — East Texas A&M University, Commerce, TX
Bachelor of Science, Computer Science — Devi Ahilya Vishwavidyalaya University, India