



CA Jitendra Jain

Focus - Large-scale Strategic Financial Planning, Advisory, Trainer and Business Mentorship

Avant-garde Business & Financial Analyst – Driving Force Behind Budgeting, Forecasting and Strategizing Business Operations To Create Enterprise-level Solutions

An Accomplished Yet Evolving Business Advisor, Acquisition Expert, Chief Financial Officer Who Has Forayed Into The World Of Excellence In Financial Planning And Analysis, Management Consultancy, With A Rare Track Record Of Success In Creating Sustainable Growth Model By Introducing Risk-Free, Feasible And Future-Proof Strategies For Budgeting, Working Capital And Cash Flow, Accounting System Analysis And Redesign, And Succession Planning For The Established & Flourishing Entities

Exclusive Professional Benchmarks Paving The Way For Many More

Achieved Greater Heights In The Global Strategic Financial Planning And Analysis Of Organizations Explored.

Transformed The Concept Of Budgeting, Forecasting And Ad Hoc Analysis By Injecting Process-Driven Tasks Aided By Pioneering Technological Solutions.

Rare Track Record Of Reengineering Organization With A Keen Eye On The Future. Led The Process Of Creating Organization Of Today And Tomorrow.

Instituted Strategy For The Talent Development And Retention In Organizations With Massive Human Presence And Multitude Of Challenges.

Advocated The Idea Of Developing United Voices About Products, Issues And Services Significant To The Organization Among Team Members.

Set Milestones In Analyzing Liabilities And Investment, Conducting Risk Management And Ensuring Cash Flow Is Appropriate. Played Key Role In Building Sustainable Income Stream.

Forged Mutually Beneficial Connection By Actively Building Strong Relationship With The Senior Officials, External Partners And Stakeholders With Periodic Touch-Base Sessions Involving Effective Communication.

Promoted Good Working Practices For Every Opportunity Among The Team Members.

Harmonized Combination of Competencies

Prolific Strategic Planner & Analyst –

1. Financial management
2. Business advisor
3. Budget planning
4. Operations management
5. Strategic marketing
6. Brand management
7. Industry penetration
8. Revenue management
9. Expense management
10. Cost reduction

Excellence That Evolves –

1. Decision-making
2. Technology proficiency
3. Optimization of technology
4. Process improvement
5. Mentoring
6. Commitment to excellence

Interpersonal Skills –

1. Self-motivation
2. Assertiveness
3. Adequate delegation
4. Empathetic listener
5. Relationship cultivation
6. Employee engagement
7. Receptiveness to feedback
8. Being appreciative
9. Flexibility
10. Transparency

Expertise – Management Consultancy, Business Acumen, Financial Expertise

Work Experience

Credit Analyst (Sep, 2006 – Jan, 2008) At Kotak Mahindra Bank Ltd. – A Leading Indian Private Sector Bank Headquartered at Mumbai, India.

Led A Foray Into Entity's Strategic Financial Health Analysis And Decisive Analysis Of Areas Of Evaluation.

Key Highlights

Led the process of injecting astute financial analysis techniques related to both the qualitative and the quantitative data, into the system.

Effectively analyzed credit applications-proposals utilizing credit guidelines and practices adhered to by the system.

Earned recognition for realistic recommendations tied to the analysis and assessment of credit risk after penetrating into the perceived needs, financial risks, third-party report, customer base, and macro-economic climate.

Acted as a proficient observer in areas of examining annual reports, profit and loss statements, financial statements, management accounts and even additional market data reports, with years of experience to credit.

Instituted all credit analysis processes and contributed to team rapport with knowledge and competence.

Worked closely with the Operations Department on automation of the borrowing system.

Worked collaboratively with customers through insightful discourses to discuss and execute transactions with favourable terms.

Served as an Architect who mastered the details of a specific industry, proactively crafted brilliant analysis and paved the way to mitigate risks involved while staying up-to-date with the trends.

Witnessed a remarkable change of events and played a truly remarkable role in the decision-making process in compliance with company's policies and procedures.

***Relationship Manager (Feb, 2008 – Sep, 2008) At Kotak Mahindra Bank Ltd.,
Ahmedabad, Gujarat, India. Base: Mumbai, India***

***A Motivating And Transformational Role In Delivering Incredible Operational Support
And Stimulating Healthy And Long-Lasting Relationship With Customers In A Way That
That Surpassed What Prevailed Till Then.***

Key Highlights

In charge of the North & South Gujarat regions and responsible for its success and expansion within that territory.

Led successful acquisition of new clients through various channels with customer-oriented mindset.

Served as a Driving Force for the successful pre and post disbursement relationship across all industries.

Negotiated transactions conditions and terms for each customer through comprehensible and transparent process.

Dealt with diverse business products such as Rent Discounting, CC, Term Loan, Export Packing Credit, OD Against Property, Letter of Credit, etc.

***Manager - Business Lending (Sep, 2008-January, 2010) At Royal Bank of Scotland –
Vadodara, Base: India***

***Functioned As A Strategically Developing Finance And Automation Leader Who Simply
Evaluated, Re-Designed And Implemented.***

Key Highlights

Led process-driven analysis of financials while keeping a close eye on tremendous challenges, stringent regulations and future potential.

Played an influential role in developing excellent interpersonal skills of the entire team especially for meeting clients and understanding their unique requirements.

Proposed suitable products that align with client's requirements and portfolio after undertaking in-depth analysis of finances.

Played a key part in the credit appraisal preparation post confirmation.

Gave significant contribution to the process of handling various products like Term Loan, CC, Packing Credit, Rent Discounting, Bank Guarantee, etc.

Business Advisory Head & Partner (Jan, 2010 -June, 2011) At Value Plus Investment Advisors Pvt. Ltd.– The Family Office, Vadodara, Gujarat, India.

Skillfully Managed Business Advisory Facet Of The Organization And Played A Fundamental Role In Transforming A Wealth Management Firm Into A Family Office That Revolves Around The Concept Of Growth, Safety And Happiness For Its HNI And Ultra-HNI Clients. Advised On Initiatives Affecting Global Positioning Of The Company And Also On Resource Allocation For The Long-Term And Short-Term Initiatives Especially Related To Business Sustainability And Expansion.

Key Highlights

Performed value-added financial and business analysis especially for the development of new services or products.

Designed a totally new definition of building and maintaining healthy and productive relationship with HNI and SME clients and crafted excellent strategies.

Dealt in services Like Debt Syndication, Private Equity, Officer's Liability and other exclusive services for SMEs and Mid-corporate clients as a part of Business Advisory.

Injected optimal combination of process-driven methodology and cutting-edge technology into various areas of the entire system.

Worked with the cross-functional teams of the organization to design enhanced process, improve accuracy of the operations and trigger timeliness and commitment.

Led the process of making various trade promotions activities successful.

Instituted a sense of collaboration and motivation in the entire Value Plus team.

Developed a strategic vision to create the organization of excellence by incorporating knowledge expository, offshore resources and partnering with training and development experts.

Co-managed the process of restructuring massive human presence to drive accountability that led to exceeding sale and profit targets.

Conducted industry analysis, identified potential risks lying beneath, and led the project of rebranding of Value Plus and development of new range of services. Stellar results followed.

Entrepreneur (June, 2011- Till Date) Tapanshi Finanziell Pvt. Ltd. – Vadodara, Gujarat, India

Reforming The Concept Of Virtual Chief Financial Officer With Robust Leadership.

Key Highlights

Reformed the concept of virtual Chief Financial Officer with bespoke services - Banking and Equity Finance, Internal Audit, Accounts Outsourcing and Corporate Training.

Management consultancy, corporate training, seminar, (done)

Managed the processes for financial forecasting. Developed brilliant performance measures to support the company's strategic direction.

Studied and mitigated key elements of the risk profile of the company and clients.

Conducted educational seminars for entrepreneurs about financial management, business growth and budgeting.

Worked closely with clients with turnover ranging from 100 million to 5000 million on various facets such as Business Modelling, Long-Term Strategic Planning, Performance Review Management, Production Management, Inventory Management, and Costing, to name a few.

Advised customers on the strengthening of their financials and team development strategies, especially during the period of crisis.

Led the process of corporate fund-raising - Debt Syndication, Private Equity & IPO Related services.

Business Partner & Practicing Chartered Accountant (June, 2011- Till Date) Jitendra K. Jain & Associates. (LLP) – Vadodara, Gujarat, India

Unmatched Experience In Supporting Clients All Around The Globe With Income Tax Advisory, Auditing And Assurance, Management Consultancy, Merger And Acquisition, IPO Advisory And Loan Syndication Services.

Key Highlights

Laid the foundation of a complete professional organization that offers all range of advisory services to clients throughout the world, and consistently contributed to the vision.

Operated in collaboration with the team of seasoned professionals while maintaining long-term customer relationships.

Transformed knowledge and competence into competitive benefits.

Established quality assurance process for a diversified client base.

Credit Analyst, Kotak Mahindra Bank Pvt. Ltd 09/2006 - 01/2008
Relationship Manager, Kotak Mahindra Bank Pvt. Ltd 02/2008 - 09/2008
Manager - Business Lending, Royal Bank of Scotland 09/2008 - 01/2010
Business Advisory Head, Value Plus- The Family Office 01/2010 - 06/2011
Entrepreneur, Tapanshi Finanziell Pvt. Ltd. 06/2011 - Till Date
Business Partner, Jitendra Jain & Associates 06/2011 - Till Date
Associations:
Former Managing Committee Member, VCCI
Member, ICAI