

Kevin Harry

SENIOR ANALYST

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Summary

A Finance professional with over 5 years of experience in the industry and a strong inclination towards Data and financial analytics, Financial modelling and a focused mindset and positive attitude to help businesses grow and run efficiently. I am a hard working, intelligent, personable and highly motivated individual, capable of achieving anything I set my mind to.

Experience

Jul 2019 - Present

Senior Analyst - Wealth Management JP Morgan & Chase Co, Bangalore, India

- Part of the Global Business Management team that supports the US Deposits and Custody business for the Private Bank
- Maintain interest rate sheets on a daily basis for all the products across the deposits spectrum that is sent used by Front Office and PB clients
- Prepare business review decks for Senior Management with key sales metrics and analysis with commentary and business updates
- Liaison between operations, tech, client service and front office sales teams to make sure the business runs smoothly and client experience is not disrupted
- Project management - lead, collaborate and execute on strategic initiatives of the business to help enhance client experience, launch new products and bring in more efficiency to business processes by reducing errors and time taken to execute tasks
- Taking on adhoc reporting and analytics projects to help the business with summarising data and enable effective decision making
- Bringing in Internal Controls and Compliance by creating and maintaining standing operating procedure documents for every activity, evaluating and actioning on

Skills

- Proficient in MS Excel, MS Word, MS PowerPoint and MS Access
- Good verbal and written communication skills
- Established team player who thrives on teamwork and collaboration
- Forecasting and Budgeting process
- Oracle Hyperion Essbase and CORE
- Oracle Data Visualization (equivalent to Power BI)
- Systems, Applications & Products in Data Processing (SAP) in Financial Accounting
- Oracle Fusion CRM and Oracle Sales Intelligence
- Financial Statement Reporting and Variance analysis
- Financial Modelling

Hobbies

Travelling

Reading newspapers and books

Avid Football Fan

Fitness enthusiast

Investing in the Stock Market

Online Gaming

Awards

**MVP award at Oracle
in Q219**

control analytics metrics of the Deposits business and making sure we are audit-ready always

- Applying rate exception rates (higher than standard) to savings, index and sweep deposit accounts in order to maintain a competitive edge and retain client balances
- Approving waivers of overdraft charges on client OMNI accounts

Jul 2016 -
Jul 2019

Lead Financial Analyst - FP&A

Oracle Corporation, Bangalore, India

- Part of the FP&A team that currently supports the France, Italy, Spain and Russia sales, finance and operations team
- Standard Management reporting for the regions. This included creating pipeline reports to the finest detail, quarter-end tracking and reporting of revenue, expenses and headcount with margins
- Owning and executing the complete forecast process of expenses and headcount providing a P&L view of each region with the respective KPIs
- Annual Budgeting of sales revenue, expenses and headcount using guidance given from top management and creating financial models to build it and report to the business
- Producing business review decks for senior sales/operations management on a regular basis
- Financial analysis of actual performance with forecast and budget providing variance analysis

- Actively participating in sales revenue forecast meetings providing the management with critical intelligence to enable them to make strategic decisions
- Cloud revenue forecasting by for PaaS and IaaS products sold in the region done on a quarterly basis
- Commission accrual for the entire sales force and VP compensation computation on a quarterly basis

Jun 2011 -
Mar 2013

Associate- Finance & Accounts

Vedanta Ltd, Goa, India

- Part of the accounts payable team, where I was responsible for analyzing and processing all payments related to Codli and Amona iron ore mines in Goa
- Estimating and organizing daily fund requirements for the payments with the treasury team
- Scrutiny of vendor ledgers for outstanding debit/credit balances
- Accounting of transactions on sale of scrap of the company
- Raising necessary Debit and Credit notes on

Received the Most Valued Player award among 300 employees across the floor by Mr. Iain Lourie, VP and Head of Finance, EMEA - for exceptional work and success of the Sales management reporting migration project

Spot award at Oracle in Q117

Received a sport award by Mr Ganesh Ramaswamy, Sr Director of Finance, EMEA - for coordinating transversely, and adapting to the new job in the UK finance team while supporting critical activities of the business during the quarter end close



Education

MBA - Finance San Jose State University

Jun 2014 -
May 2016

Final Thesis- A study of the Mutual Fund industry in India

Bachelor of Commerce

Jun 2008 -
May 2011

Northeastern University

- vendors and customers
- Passing of month-end closing entries as per schedules of accounting
- Producing and providing analysis on year-end financial statements

Apr 2015 -
Jun 2015

Financial Advisor (Internship) **Imperial Wealth services**

- Part of the research and analysis team where we analysed stocks and funds using fundamental analysis and technical analysis to pick attractive investment opportunities for the existing client base of the firm.



Projects

Migration of the sales management reporting to Oracle Data Vizualization

New sales metrics dashboard created in Oracle Data Visualization tool for the sales and finance teams. This helped eliminate the weekly arduous excel spreadsheets and significantly reduce time taken and bring in efficiency in the process. Data on the dashboard being live and dynamic, also brought out the most up-to date metrics, making the forecast call more efficient.

Global deposits rate exception workflow

New ticket created in Connect to replace excel spreadsheet requests, back and forth email communication and provide a much more streamlined process for bankers and investors as well as eliminate errors and create accountability.



Certifications

NSE Certification- Financial Markets

Fundamental understanding of the governance and nuances of financial markets in India