

Palak Chandalia

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Summary

A FP&A and Investments professional having over 3 years' experience in the Corporate Finance space. Extensively worked on complex financial modelling, risk mitigation strategies, ad-hoc analysis, forecasting, critical business decision making, budgeting and building investment memos in sectors like Healthcare, Technology, and Automobiles.

Aspiring to help grow and support the company I work for, by applying my extensive experience of FinTech Business Development partnership deals, M&A workflows, Asset-backed financing, analyzing company performance against core KPIs, and familiarity with Tableau, Hyperion, Salesforce.com, SAP, Financial Force and advanced MS Excel and PowerPoint during my previous work experiences.

Experience

CROWDERA—California, USA

May 2018 – Present (1-year, 1 month)

Crowdera is a free global online crowdfunding platform that supports social impact and innovation serving individuals, non-profit organizations and social innovators. Founded in 2014 and has raised funds in a pre-series A round of funding.

Finance Program Manager and Investor Outreach Officer for the *Thrive5 Focus Group*, which is the startup acceleration studio of Crowdera, created for entrepreneurs and seed-fund startups looking for funding, growth, coworking space and guidance to succeed. Extensively working on launch of our FinTech blockchain fund and our SaaS product, to be released end of this year.

- ✓ Working on several Business Development partnership deals to get more partners and investors into our cohort programs, M&A discussions from the start to the end of projects, and public accounting (under US GAAP standards in Adaptive Planning), since it is a growing company having huge capability and goals.
- ✓ Working closely with the CEO and CFO to help onboard the primary board members and reach out to global individual and institutional investors
- ✓ Extensively using Salesforce Lightning as our cloud platform, where I create several comparison metrics, personalized dashboards and assigning tasks. Also initiating the launch of our own blockchain fund in the US FinTech space and our SaaS product within California and Singapore.
- ✓ Dealt with day-to-day accounting to help forecast revenues and expenses and create reports for companies through SAP and Hyperion
- ✓ Have a major role in “The Thrive5 Accelerator Framework program” which included selling various package goodies like Crowdera Premium Plan Credits, AWS Credits, AWS Trainings, Wittyfeed Articles, Press Outreach and KYC/AML Credits by Civic to the co-working spaces, to be converted to an accelerator in part of the program.

PREMJI INVEST—Bangalore, India

December 2015 – December 2017 (2 years)

Premji Invest is a multi-strategy crossover fund (with a corpus of US\$ 1bn) of Azim Premji (Chairman of Wipro Technologies), investing in venture capitals and public equity in India, United States and China.

Financial Analyst. Reported to the investments team, consisting of 8 analysts specializing in different sectors.

- ✓ Analyzed vast amount of financial data, spotted trends, created portfolios and developed short term and long-term forecasts. Also measured the financial risk while making 3 major investment decisions at the board level.
- ✓ Evaluated over 100 funding opportunities through development of 20 detailed investment memos. Built several financial models and conducted research across sectors such as Technology, Healthcare, Automobiles, FMCG, Retail, Telecommunication, Capital Goods, Real Estate and Power (Utilities).
- ✓ Worked on 6 Initial Public Offering (IPO) deals, out of which, 2 were successful investment additions worth \$350,000 to the Premji portfolio.
- ✓ Built relationships with over 20 sell-side analysts resulting in additional company and industry details.
- ✓ Indulged in sector mapping and secondary research to analyze and evaluate competitive strategies of 14 companies in the personal care segment, leading to 12% increase in funding.

- ✓ Monitored over 50 portfolio investments by keeping abreast with market developments, tracking lead indicators, interacting with company management and industry experts.

AON (TANZANIA) LTD—Dar es Salaam, Tanzania

June 2012 – November 2012 (6 months)

AON is a leading global professional services firm providing a broad range of risk, insurance, retirement and health solutions, data and analytics, operating in 120 countries.

Finance Intern. Assisted the finance and accounting teams to manage the

- ✓ Managed renewals for existing clients, policy updating, raising credit notes and invoices, updating 'underwriting reports' and meeting corporate clients and negotiating terms with insurers.
- ✓ Shadowed the VP of Growth and CFO, to forecast/budget annually, prepare reconciliation statements and work on day-to-day accounts of the company, providing 15% value addition to the finance team.
- ✓ Also learned key concepts of cost accounting and Bill of Material process, while analyzing insurance policies for manufacturing companies

Education

Master of Science in Finance and Investments (MSc Honors)

September 2014 – August 2015

Aston University | Birmingham, UK

- ✓ **Notable Modules:** Valuations of Investments, Business Finance, Market Microstructure, Financial Econometrics and Quantitative Methods of Finance.
- ✓ Successfully completed a Master Dissertation on the topic of 'Forecasting Asset Price Densities' by generating various Econometric models on the EViews 9 Software.

Bachelor of Science in Finance (BSc Honors)

September 2011 – June 2014

Aston University | Birmingham, UK

- ✓ **Notable Modules:** Financial and Management Accounting, Making Managerial Decisions, Principles of Micro and Macro Economics, Applied Econometrics and Forecasting, Investments and International Finance.
- ✓ Was selected as a student international ambassador during this period, to represent the University to potential students and their families.

Additional Information

Languages:

1. English – full professional proficiency
2. Hindi – native proficiency
3. French – intermediate proficiency
4. Swahili – intermediate proficiency

Skills & Accomplishments:

1. Leadership and Initiative – Have been a "Voluntary and Internships Coordinator" in the Banking & Finance Society at Aston University, where I helped students connect with potential employers.
2. Tools – Developed good experience of Bloomberg, Anaplan, NetSuite, Salesforce.com (SFDC), Hyperion, NetSuite, Tableau, Financial Force, SAP, Workday and an advanced level of Microsoft Office. Fair knowledge of payment gateways (Stripe, Braintree, PayPal).
3. Achievement – Was chosen by Aston University to have my student profile on their [website](#), due to being a committed and hard-working student ambassador.