

## PROFESSIONAL PROFILE – Strategic Finance Leader

### Strategic Finance & FP&A Leader | Decision Intelligence, Capital Allocation & Risk Optimisation | Enterprise & Growth Organisations

- **Trusted strategic advisor to CFOs and Boards**, driving multi-entity, multi-currency capital allocation, portfolio optimisation, and enterprise-wide risk oversight **to maximise shareholder value and investment returns**.
- Architects high-impact, finance-driven decision engines leveraging ERP automation, Power BI, and AI-enabled predictive analytics to accelerate strategic decision-making, improve forecast accuracy, and drive measurable ROI.
- **Directs cross-border finance and analytics teams across Africa, Europe, and North America**, producing real-time executive insights, predictive dashboards, and actionable investment guidance for capital allocation and portfolio oversight and sustainable business strategy
- **Portfolio of strategic finance and automation initiatives:** <https://jatinchotoo.github.io>

### Career impact highlights:

- **30% faster month-end close across 7+ subsidiaries via ERP automation**, enabling immediate CFO and executive investment decision-making.
- **20% improvement in forecast accuracy using scenario modelling and predictive analytics (Python, Power BI)**, guiding \$150M+ portfolio investment and capital allocation decisions with 85%+ reliability.
- **12% cost savings & enhanced operational ROI across 50+ employees** through strategic capital allocation and finance process automation for enterprise growth.
- **25% projected revenue growth by translating FP&A insights into actionable business decisions**, including pricing optimisation and market expansion, **impacting USD 50M+ shareholder value**.
- **15% reduction in portfolio risk exposure and improved cash flow predictability** through advanced credit risk oversight **covering 100+ investment accounts**.
- **Standardized global financial data architecture by leading cross-border teams**, implementing consolidated reporting, multi-currency management, and predictive dashboards **for investment-grade reporting**.

## EDUCATION, QUALIFICATION & CERTIFICATIONS

- **BCompt Accounting Science**, University of South Africa | Oct 2023 (NQF 7)
- **Postgraduate Diploma**, Professional Accountant in Practice, SAIPA/FASSET | 2016 (NQF 8)
- **Certificate, Financial Modelling & Valuation**: Corporate Finance Institute (CFI) | Expected 2026
- **AI-Powered Data Insights Internship**: Excelerate | Jul – Aug 2025 (*Predictive analytics, FP&A dashboards, Python/Power BI*)
- **Virtual Finance & Corporate Projects**: Forage | Nov – Dec 2025 (*Investment simulation, valuation, scenario analysis*)
- **International Diploma**, Computer Studies, University of Pretoria | 2003

## CAREER EXPERIENCE OVERVIEW:

- **Finance & Business Strategy Manager** - J Segel and Associates Inc | Jul 2025 to Dec 2025 (Contract)  
Delivered corporate finance advisory, FP&A, and strategic business planning across SMEs and high-growth clients, emphasizing investment strategy and capital allocation outcomes.
- **Financial Reporting Manager** - Havas Group | Feb 2024 – Jun 2025 (Retrenched)
- **Finance & Advisory leadership (FASSET)**- DK Motiram & Company | Mar 2014 – Mar 2017

### Detailed role History Financial Reporting Manager Havas Group | Feb 2024 – June 2025

**Role Overview:** Reported to the CFO with accountability for FP&A, capital allocation, corporate finance advisory, investment strategy execution, and multi-entity financial reporting across African operations. Delivered executive-level insights to drive portfolio performance, capital allocation, and multi-currency investment decisions.

### Key Contributions:

**FP&A & Investment Analysis:** Led \$150M+ multi-currency portfolio planning, budgeting, forecasting, variance analysis, and investment evaluations across USD, GBP, EUR, and NGN operations. Performed DCF, WACC, and

scenario analysis to support capital deployment and investor-grade decision-making.

**ERP Transformation & Automation:** Migrated multi-entity financial operations to Adams ERP, automated reporting workflows and integrated cross-currency data, achieving 30% faster close and 12% cost savings while enhancing executive investment visibility.

**Predictive Revenue & Risk Analytics:** Built predictive forecasting and portfolio risk models (85%+ accuracy) to improve revenue visibility and proactively manage investment exposure.

**KPI Automation & FP&A Dashboard:** Developed real-time FP&A dashboards using Power BI and Python, reducing manual reporting by 30% and enhancing investment decision-making accuracy by 20%.

**Strategic Decision Support:** Delivered actionable insights that enabled 25% projected revenue growth, optimized capital allocation, and strengthened governance frameworks for high-value investment decisions.

## Notable Projects:

- **ERP Transformation & Automation – Havas Group | 2024:** Executive dashboards for capital allocation, investment scenario modelling, and KPI tracking.
- **Predictive Revenue & Risk Analytics – AI Internship | 2025:** Random Forest, XGBoost, LightGBM models for portfolio and investment risk assessment.
- **Investment & Valuation Simulation – Forage Virtual Projects | 2025:** Multi-scenario DCF/WACC analyses to inform risk-adjusted capital allocation strategies.

## FINANCIAL SYSTEMS & ANALYTICAL TOOLS EXPERTISE

- **ERP & Accounting Systems:** SAP, Oracle, Adams, Sage Pastel, QuickBooks, Xero, Navision, Magnitude
- **Business Intelligence & Analytics:** Power BI (DAX, Power Query, visualization, reporting), Tableau, Advanced Excel (pivot tables, macros, financial modelling for investment/valuation)
- **Financial Platforms:** SARS e-filing, Chase, Accpac, Pastel Payroll, Valuation software, IFRS reporting for corporate finance and listed companies

## CAREER EXPERIENCE (2012 – 2024)

### Finance & Business Strategy Manager – (Contract) | J Segel and Associates Inc | Apr 2017 – Jan 2024

- Delivered corporate finance advisory, FP&A insights, and strategic business planning, emphasizing investment strategy, capital allocation, and portfolio optimisation.

#### Key Achievements & Projects:

- Conducted investment due diligence, credit risk assessments, and portfolio oversight.
- Implemented finance transformation initiatives using ERP, AI, and automation to enhance investment-grade reporting and decision-making.
- Applied scenario modelling and ROI-focused strategies to optimise investment and business growth outcomes.
- Delivered FP&A dashboards and visualizations for senior leadership, enabling data-driven investment and capital allocation decisions

### Finance & Advisory Leadership (FASSET) – DK Motiram & Company | Mar 2014 – Mar 2017

- Provided strategic financial advisory, FP&A, and corporate finance support for clients, including M&A and cross-border investment analysis.

#### Key Achievements:

- Improved budgeting, forecasting, and variance analysis for client portfolios with focus on investment impact.
- Supported investment strategy, portfolio management, and risk mitigation.
- Advised clients on capital allocation using scenario planning and financial modelling.

### Finance & Controls Training – Mahdi Meyer Steyn | 2013 – 2014

- Developed expertise in FP&A, treasury, financial governance, and investment risk management processes.

### Trainee Accountant (SAICA) – Waterman's Services | 2007 – 2012

- Gained foundational experience in corporate finance, FP&A, treasury management, and investment reporting

## Professional Development & Certifications:

### AI-Powered Data Insights Internship (Excelerate)| Jul – Aug 2025

- Built finance-ready dashboards and visualizations (Python, Power BI, Advanced Excel).
- Developed predictive models (Random Forest, XGBoost, LightGBM) achieving **85%+ accuracy**.
- Applied predictive analytics to FP&A, risk forecasting, and portfolio oversight.

### Virtual Finance & Corporate Projects – Forage | Nov – Dec 2025

- Completed simulated projects with JPMorgan Chase, Citi, Goldman Sachs, BCG.
- Applied scenario analysis, valuation, and risk assessment in cross-border contexts.

### Advanced Financial Modelling, Corporate Finance Institute (CFI)| 2024

- Completed DCF, WACC, and scenario analysis projects, including financial model automation and forecasting.

### Power BI and Financial Modelling Webinars, Havas University| 2023

- Built KPI dashboards, scenario planning tools, and executive reporting frameworks.

## AREAS OF STRENGTH

- **Optimizer:** Drives financial efficiency, profitability, and risk mitigation through system/process improvement, capital allocation, and investment optimisation.
- **Investigator & Assessor:** Identifies financial, operational, and market risks; detects inefficiencies and growth opportunities; strengthens governance and executive decision quality.
- **Analytical Problem-Solver:** Applies structured analysis, scenario modelling, predictive analytics, and investment-grade reporting to solve complex corporate finance and portfolio challenges.
- **Corporate Finance Strategist:** Integrates FP&A, capital allocation, investment evaluation, and ESG/sustainable finance principles to inform growth, M&A, portfolio optimisation, and shareholder value creation.

## CORE SKILLS & COMPETENCIES

- **Financial Planning & Strategy:** FP&A | Corporate Finance | Treasury Management | Capital Allocation | Investment Strategy | Portfolio Management | Budgeting & Forecasting | Scenario Planning | Cost Optimisation | Financial Performance Management | Growth & M&A Advisory
- **Risk, Investment & Governance:** Credit & Counterparty Analysis | Investment Due Diligence | Valuation (DCF, WACC) | Portfolio Risk Oversight | IFRS & JSE Reporting | Internal Controls | Financial Governance | Basel III & Liquidity Risk | ESG & Sustainability Risk Integration
- **Technical & Analytics Tools:** Power BI (DAX, Power Query, Visualization, Reporting) | Advanced Excel (Financial Modelling, Macros, Valuation) | Python (Pandas, NumPy, Predictive Analytics) | ERP Systems (SAP, Oracle, Dynamics, Adams, Sage, QuickBooks, Xero) | KPI Automation | Finance Process Automation | Decision Intelligence Tools
- **Leadership & Business Capabilities:** Executive Stakeholder Engagement | Strategic Decision Support | Change Management | Cross-Functional Leadership | Mentoring & Team Development | Process Optimisation | Sustainable Finance & ESG Awareness

## Additional Information:

- Languages: English (Fluent)
- **REFERENCES:** Available upon request.