**[Investment Research Associate](https://www.postjobfree.com/resume/ad1o62/investment-research-jacksonville-fl)**

**Location:**Jacksonville, FL

**Posted:**December 04, 2023

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**Resume:**

Aakanksha Johari

Jacksonville, FL

Cell: +1 904-235-4983

email ID: aakankshajohari@gmail.com

Summary:

Graduate in Finance – bachelor’s in commerce, versatile professional with over 8 years of in-depth knowledge and experience in Research on Business & Financial, Data Research, Investment Banking Projects, outsourcing processes. Have successfully managed complex operations. Have a good exposure of teams & projects management and client handling.

Qualifications

Secondary Examination

in 1998, Delhi (C.BS.E.)

Senior Secondary

Examination in 2000

Delhi (C.B.S.E.), India

B. Com in 2003 Delhi

University, India

Professional Experience

Evalueserve May 2006 – July 2012

Evalueserve.com Pvt. Ltd. - The organization is a knowledge outsourcing firm, involved in offering research services such as Investment research, business research, market research, research on intellectual property, data analytics etc.

Designation: Senior Research Associate

Job Profile: Worked on various projects of Investment Research Department. My job involved gathering information through various data sources and analyzing information according to client’s (Deutsche Bank) requirements and presenting it in client ready format.

Projects: Equity Focus, Discloser Verification Support, Financial Research and Parent tracking and mapping.

Managing research products for the Equity Focus Group globally.

Preparing investment newsletters for Banks’ internal and external clients focusing on the top stocks every day, highlighting major changes in recommendations, target price and estimates. Asian, Japanese, European, and North American region.

Comprehending the analyst reports, summarizing them in the customized manner for the sales force and external clients Synopsis of all Projects.

Collecting financial information from different data sources like Bloomberg, Reuters etc.

Company analysis ensuring seamless delivery of services to the client, meeting all the quality parameters as specified.

Regular interaction & feedback with clients on any issue & getting project improvements.

Other responsibility:

Managing work allocation to the team of analysts and researcher.

Sharing ideas and feedback with team. Initiated the knowledge sharing activity.

Regularly communicating to client teams/management for project updates, queries, and feedbacks.

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Personal Traits

• Honest

• Accountable

• Collaborator

• Punctual

• Flexible

• Adaptive

Person

Hewitt Associates April 2004 – May 2006

Hewitt is an HR Benefit Administration offering services like 401K record keeping, Pension Administration, Health & Group Benefits, maintenance of database of employees of more than 130 multinational Clients under IRS rules and regulations. It involves processing participant requests for numerous services – DC Plans (401 K), DB Plans (Pension) & H&GB Plans. Designation: Team Developer

Job Profile: Worked on various projects in accounts payable and HR outsourcing. My job involved the process of financial data, analyzing different documents, processing cheques and procedures. Projects: DC Plans

(401 K), DB Plans (Pension) & H&GB Plans

Managing Team of Process Associates

Allocating targets to the team based on daily capacity.

Processed the scanned images of checks related to ELP, MLP &Rollovers different clients.

Processed of DB overpayment checks

Migrate (transit) DC and DB clients with an updated SOP in the process.

Reconciled the Query reports with the Deposit letter.

Compilation of Audit results and making recommendations/ suggestions related to the Audits.

Process training of new associates.

Achievements/Trainings

Quality Certified Yellow Belt by Hewitt Associates.

Promoted as Subject Matter Expert (S.M.E) for the process.

Updated Training manual for all form types processed by Checks group.

Created Quality checklist for Auditing purpose.

Awarded the Star of the Month.

Awarded Endeavor Award (Extra Effort) for the month of Aug 2005

Contribution to process improvement and was awarded 2Quest Certificates.

Appreciated by the process owners for successfully meeting the SLA parameters during the annual enrollment period.

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