



Swati Gupta, CA

Swati is an accounting and finance professional with nearly 20 years of experience supporting complex financial reporting, forecasting, and business transformation initiatives. Her background includes Big 4 experience and spans advisory, tax, and finance roles, where she has led large-scale system conversions, budgeting and forecasting efforts, and cross-functional process improvements.

Credentials & Expertise

Expertise

- ◆ Financial Reporting
- ◆ Variance Analysis
- ◆ Forecasting and Budgeting
- ◆ Business Process and IT Optimization

Industries

- ◆ Finance
- ◆ Automotive
- ◆ Investment Management
- ◆ Real Estate

Highlights

- ◆ **Hyundai AutoEver America**, Senior Financial Analyst (Consultant)
- ◆ **KPMG**, Advisory Senior Associate
- ◆ **E&Y**, Tax Senior Consultant

Achievements

- ◆ Managed \$100M portfolio comprised of over 250 IT projects for Hyundai.
- ◆ Assisted one of America's largest investment management firms transition to new accounting platform; led fund conversion workstream for the Global Portfolio Accounting Group, responsible for converting over 300 funds (with over \$1M in AUM) to the new accounting platform.
- ◆ Analyzed and identified strategies for billion-dollar real estate fund to exit from its Indian joint venture; devised various options for the client to avoid \$400K indirect costs and taxes.

Technical Proficiency

- ◆ Operating Systems: Windows, MAC
- ◆ Tools/Applications: SAP, Oracle, MS Office, MS Project

Associations & Certifications

- ◆ Chartered Accountant (CA), Institute of Chartered Accountants of India

Education

- ◆ **Bachelor of Commerce**, Jesus & Mart College (Delhi University)

For over 15 years, BGA has proudly filled the gap that often exists between accounting firms striving to maintain independence and their clients. We understand the compliance requirements and needs of our public and private clients. Our unwavering commitment to excellence has enabled us to assist thousands of domestic and international companies with everything from complex M&A transactions to IPOs and technical accounting for financial reporting.

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Experience



Hyundai AutoEver America (HAEA) ♦ Senior Financial Analyst – 2018 to 2020

- ♦ Worked with 60 project managers, analyzing cost data to perform monthly financial forecasts amounting to over \$75M per year.
- ♦ Designed and produced periodic financial reporting packages, including project financial review dashboards, client project financial reviews, and monthly variance analysis.
- ♦ Performed analysis on data from various sources to facilitate budgeting, forecasting, variance analysis, IT optimization, and other corporate initiatives.
- ♦ Analyzed, reviewed, audited, and improved financial and other data submitted by operation managers or extracted from SAP and other databases for budgeting, forecasting, and client billing.
- ♦ Helped design, organize, and execute company's annual budgeting processes.
- ♦ Performed year-end close procedures for annual accruals, 'Project' to 'Opex' transfers, and budget transfers.
- ♦ Implemented budgetary control over expenses and managed budget adjustments.
- ♦ Analyzed related data and provided timely and relevant insight and recommendations for business decision-makers during planning and execution phases of projects and operations.



KPMG US ♦ Advisory Senior Associate – 2014 to 2018

- ♦ Created and maintained detailed conversion playbook using MS Project, which resulted in accurate and timely conversion and cutover of funds.
- ♦ Led three mock conversion cycles successfully prior to final conversion. These involved detailed planning, resource alignment, scheduling activities, tracking conversion plans, and developing real-time solutions for disruptors.
- ♦ Supported client's tax team through complex daily and month-end close procedures before the cutover date.
- ♦ Designed, developed, and documented company's specific procedures and tax calculations for various complex accounting instruments, resulting in timely completion of fund tax returns.
- ♦ Trained associates and contractors on newly developed procedures and calculations and reviewed their work for accuracy.
- ♦ Assisted one of the largest media houses in the US with month-end accounting close after serious system breach, helping them meet stringent deadlines on time.
- ♦ Led firm's 'Back Office Transformation' initiative as the senior in charge – an initiative across specific service lines to standardize, enhance and optimize existing firm's offerings.
- ♦ Conceptualized and created uniform multi-function and multi-practice transformation approach & templates for quick use by sales teams.
- ♦ Advised various multinational clients on tax-efficient structures for doing business in India, keeping in view the proposed business model & tax regulations.



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Experience

- ◆ Assisted India's leading real estate groups on business restructuring assignments to achieve the stated objectives.
- ◆ Advised major real estate groups in India on ways to mitigate possible tax leakages in funding arrangements between banks and developers.
- ◆ Advised UK's largest coffee brand on its business expansion plans in India, analyzed possible tax issues, and devised transfer pricing strategy for new Indian entity.



Ernst & Young ◆ Tax Senior Consultant – 2007 to 2012

- ◆ Prepared detailed opinions for lawyers/senior legal counsels on various possible tax issues relating to domestic/international transactions.
- ◆ Advised on inbound investment structuring including advice on jurisdiction analysis, capital mix, repatriation options, and more.

Contact Us

Blythe Global Advisors, LLC

Blythe Global Advisors is headquartered in Southern California with a broad geographic reach across the United States via the BlytheTeam®

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