

GARGI S. BHAVE

SENIOR MANAGER

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PROFILE

As a part of the ITES industry I have over 12 years of experience in Financial Services that involved working with Mutual Funds, Insurance companies, NBFCs and a start up Legal Tech.

During my stint at the start up, I incubated and developed India's foremost comprehensive online Estate Planning (Will) platform, WillSecure. Here, I also looked after sales, promotion & distribution, channel acquisition & management, operations and financial accounts. The platform subsequently got acquired by Kotak Bank and is being offered as a value add service to the private wealth customers

I have led product development, pre-sales, implementation and support of investment management software solutions across multiple geographies and have engaged with marquee clients

KEY ACHIEVEMENTS

3i Infotech Ltd.

- Worked with the sales team to clinch 3 new mandates through complex solutioning for non-standard requirements
- Additional revenue of 1 Crore by cross selling existing functionalities
- Leading pre-sales globally for their Investment management solution
- Solution architecting for continuous product improvement and key business modules

Ameretat Technologies Pvt. Ltd

- Was involved in the creation of 'WillSecure', an innovative solution for Estate Planning, from its conceptualization till launch

FinEng Solutions Pvt. Ltd/ 3i Infotech Ltd

- Became the functional head with just 3 years of business analyst experience
- Contributed significantly in Version upgrade of the product and its roll out to the existing clientele
- Managed pre-sales and was instrumental in client acquisitions in new geographies like Mauritius
- Did solution architecting of key modules like Equity, Derivatives, Arbitrage, Mutual Fund, accounting, Equity and derivative STP etc

JOURNEY

3i Infotech Ltd

Senior Manager

📅 Since April 2017

Ameretat Technologies Pvt. Ltd

Vice President

📅 Aug 2012 – March 2017

FinEng Solutions Pvt. Ltd/ 3i Infotech

Associate Consultant

📅 Aug 2007 – Aug 2012

CMIE

Information Officer

📅 Feb 2007 – Jul 2007

DOMAIN

Equity & Derivatives

Fixed Income Securities

Mutual Fund

Alternative Investment Fund

Fund Accounting

Performance & Portfolio Analysis

Investment - NBFCs

Estate Planning - Wills

SKILLS

Business Analysis

Domain based solution architecting

IT Project and Program Management

Project implementation

Pre-Sales

Customer relationship management

Start up - end to end

EXPERIENCE

3i Infotech Ltd

Senior Manager

📅 Since April 2017

1. Acquired three new clients in three different LOBs -Baroda Pioneer MF(MF), Edelweiss AIF(AIF) and L&T Financial Services (NBFC). There were no new mandates for Quantis since 2012
2. Conducted complete requirement analysis of the three new clients and managed implementation of the three projects
3. Created opportunities to offer the unexplored modules/functionalities of the product to the existing customers thereby increased team's revenue by 1 Cr.
4. Worked on the following developments (functionally)
 - Revamped arbitrage module and incorporated additional functionalities like Portfolio Rollover
 - Incorporated rejection mechanism in debt deal work flow
 - Introduced condition based deal authorization
 - Debt redemption scheduler
 - Debt redemption premium
 - IFRS related changes in accounting module- EIR amortization, MTM for FVTOCI, report showing amortization spilt
 - Integration with several third party systems for LTFS using APIs
5. Analyzed Mfund Plus from functionality, usability and design perspective and gave recommendations for its improvement.
6. Streamlined internal process related to SDLC thereby improving the quality of delivery
7. Streamlined invoicing and other important internal processes
8. Strengthened the team in order to provide better service to the clients

Ameretat Technologies Pvt. Ltd

Vice President

📅 Aug 2012 -- March 2019

1. Incubated and developed India's foremost comprehensive online Will Writing platform, WillSecure-www.willsecure.in. The product has been acquired by Kotak Mahindra bank and renamed as SmartWill. It is a part of the bank's smart solutions to its customers
2. Documented end to end specifications of the application
3. Created test cases end to end of the application and conducted testing
4. Managed the project; the project was live in record time of 8 months
5. In addition to SDLC, handled other functions of the business - sales, promotion, distribution channel management, operations, invoicing and accounts.
6. Created strong distribution network pan India by collaborating with the top banks, broking companies, NBFCs, insurance companies, independent advisors and certified financial planners like ICICI Bank, Kotak Bank, Axis Bank, ICICI Securities, IIFL, Bajaj Finserv, Cholamandalam and ICICI Prudential etc.
7. Conceptualized and implemented sales promotional activities such as RISE (A four pronged promotion strategy), points and rewards and conducted workshops at reputed financial institutions and companies

LANGUAGES

🇬🇧 English

🇮🇳 Hindi



🇩🇪 German



EDUCATION

MBA Finance & Marketing

IMS, DAVV, Indore

📅 Jun 2005 - June 2007

MA Economics

University of Pune

📅 June 2004 - June 2006

8. Created training modules, collateral contents, promotional emailers and call centre scripts for the distributors and imparted training on the same
9. Managed social media of the platform through Facebook page
10. Provided adequate handholding to the acquirer company through knowledge transfer and training.

FinEng Solutions Pvt. Ltd/ 3i Infotech Ltd

Associate Consultant

📅 Aug 2007 -- Aug 2012

1. As functional lead of Quantis, contributed significantly in version upgrade of the product by revamping major modules of the product.
2. Was core team member in developing offshore market of Mauritius and contributed in earning revenue of Rs. 2-3 Crores
3. Headed implementation of the two biggest financial institutions of Mauritius, MCB and MUA
4. Was Relationship Manager for key accounts like Birla MF, HSBC MF in India and MCB and MUA in Mauritius
5. Created training modules and conducted training capsules for internal team and clients
6. Key functionalities completed:
 - Domestic/International Equity, futures and options module –Order, execution and settlement
 - Arbitrage dealing module-Order, execution and settlement
 - Auto equity order routing system from Quantis to Brokers Terminal
 - Derivative STP settlement module
 - Integration with OMGEO for foreign equity STP settlement
 - Introduction of broker wise saleable quantity concept for overseas clients & asset class wise brokerage
 - Compliance work flow in all the asset classes dealing module
 - Changed the system from a single currency system to multi currency system by incorporating changes in front office system, operations, exposure reports, fund accounting and cash monitoring system
 - Introduction of composite benchmarks, performance calculations, fact sheets, investment dossier, spread analysis
 - Equalization of NAV, Introduction of client dimension in product
 - introduction of new corporate actions for overseas clients like rights issue/ warrants in multiple calls

CMIE

Information Officer

📅 Feb 2007 -- Jul 2007

1. Was involved in testing of the new product Business Beacon
 2. Assisted research team by writing background of the listed companies
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