

SAFA KARBARI

📍 Mumbai, India

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PROFESSIONAL SUMMARY

Financial Executive with 5.5 years of experience implementing accounting systems with a comprehensive knowledge of general accounting. Through knowledge of all aspects of accounting operation and analysis. Proven ability to manage all aspects of accounting operation, including accounts payable, cash disbursements, accounts receivable, cash receipts, financial analysis and monthly and year-end closing assistance, schedules, and responses to an audit request. Thorough customer service professional with multitasking and time management abilities to handle demands of busy contact centre environment. Confident in independently resolving customer problems.

WORK HISTORY

Customer Relationship Specialist Insurance Accounting, 05/2023 - Current **Willis Tower Watson**, India

- Perform daily cash management duties, which includes posting of cash to the ledgers, conducting investigation and ensuring appropriate allocation of funds within agreed SLA
- Manage ledger maintenance requests on daily basis and update records of the actions taken on the operating system
- Maintain vigilance and responsiveness to urgent activity, ensuring appropriate escalation to the line manager for unresolved queries
- Conduct reconciliation of incoming & outgoing statements for Clients/Carriers and maintain up to date records on operating system.
- Delivered excellent customer service by addressing and resolving issues promptly.
- Enhanced customer satisfaction with timely response to queries and complaints.
- Managed key accounts to foster long-term business relationships.
- Maintained effective client relationships for improved customer retention.
- Management of c/f adjustments for policies approaching expiry.
- Reporting to insurance companies on unallocated receipts and negotiating deadlines.
- Developed strong relationships with clients, enhancing company reputation.
- Assisted customers in understanding complex insurance policies, improving customer satisfaction.
- Managed a significant portfolio of clients, establishing trust and loyalty..
- Communicated with customers to determine policy limits and degree of risk.
- Maintained policies by calculating premiums and processing payments.
- Applied thorough knowledge of claims procedures to process and close claims under tight deadlines.
- Liaised between customers and corporate entities to resolve financial disputes.
- Booking and allocation of payments received.
- Received insurance premiums from clients and processed accounts.

Admin / Financial Executive, 12/2021 - 03/2023

The Design Studio, Mumbai

- Systemized tracking for incoming leads including follow up and coordinating consultation appointments to be share between multiple Project Managers
- Investigated and resolved issues related to GST while releasing payments
- Timely reconciliation for all general ledgers including bank accounts and multiple supplier accounts
- Reviewed invoices for coding accuracy and approval
- Manage tax compliance processes, ensuring that tax returns are timely and accurately filed
- Essential duties and responsibilities that included managing timesheets, annual leave, and expense reports
- Processed all Accounts Receivable/Accounts Payable.
- Managed financial reporting processes resulting in enhanced transparency.
- Streamlined budgeting exercises for efficient financial planning.
- Enhanced profitability by managing cost control measures.
- Improved cash flow through meticulous accounts receivable management.
- Generated accurate financial reports using advanced software tools.
- Handled complex account reconciliations; ensured consistency in records.
- Compiled financial data for business forecasting and budgeting.
- Prepared detailed models, reports and charts highlighting complex financial information.
- Advised management on financial details related to business operations, inventory levels and budgets.
- Trained new employees on accounting principles and company procedures.
- Compiled general ledger entries on short schedule with 100% accuracy.
- Generated invoices based on established accounts receivable schedules and terms.
- Organized and carried out month-end, quarterly and year-end processes.

Admin / Executive, 02/2019 - 11/2021

Penta Galaxy LTD, Mumbai

- Prepared quarterly accounting reports, monthly financial statements, Bank Reconciliation Statements
- Manage and keep the company's tax database up to date
- Create and maintain charts of accounts and establish well-placed systems for recordkeeping and accounting purposes
- Prepared asset and liability account entries, by efficiently compiling and analysing account information.
- Implemented new filing system for improved document management.
- Prepared comprehensive reports for informed decision-making.
- Produced monthly performance reports for management to aid business improvements.
- Prepared routine reports, briefs and presentations to company specifications for internal and external use.
- Managed daily schedules for senior executive.
- Streamlined communication protocols for clear and efficient exchanges.
- Implemented promotional strategies, increasing event visibility.
- Liaised with marketing teams to create engaging promotional materials.
- Scheduled meeting agendas leading to productive discussions.
- Managed event logistics, ensuring smooth running of multiple events.
- Coordinated with vendors for seamless execution of services.
- Organised diverse team members, fostering a collaborative work environment.
- Hired temporary event staff based on budgets, event size and specialised skills required.
- Negotiated costs with suppliers to meet budgets.
- Obtained best prices for external services through research, building relationships and negotiation.

SKILLS	<ul style="list-style-type: none">• Preparing financial statement• Invoicing• CRM software proficiency• Data analysis• Customer retention strategies• Empathy and understanding	<ul style="list-style-type: none">• Customer service etiquette• Payment processing systems• Order processing• Record maintenance• Inquiry escalation• Confidentiality adherence
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EDUCATION	<p>Amity University, India Master of Business Administration: Finance</p> <hr/> <p>Mumbai University, Mumbai, Maharashtra, 06/2021 - 04/2023 Master of Commerce: Business Management</p> <hr/> <p>Mumbai University, Mumbai, 06/2018 - 04/2021 Bachelor of Management Studies: Finance</p> <hr/> <p>HSC: Commerce, 01/2016 - 05/2018</p> <ul style="list-style-type: none">• Percentage: 72• Board: Maharashtra State Board <hr/> <p>SSC, 05/2016</p> <ul style="list-style-type: none">• Percentage: 71• Board: Maharashtra State Board
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CERTIFICATIONS	<ul style="list-style-type: none">• Certified in Tally ERP 9• Certified in Advance Excel• Conflicts of interest• Anti- Money Laundering & Counter - Terrorist Financing
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LANGUAGES	<p>English:</p> <p>Marathi:</p>	<p>Hindi:</p>
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AFFILIATIONS	<ul style="list-style-type: none">• Reading Books, Travelling
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