

RONAK PATEL

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SUMMARY STATEMENT

Motivated business professional pursuing an MBA with experience in project analysis, data quality, and risk management within financial services. Skilled in project management methodologies including Agile and Waterfall, process improvement, and data analytics using Tableau and Excel. Proven ability to collaborate cross-functionally to align technology solutions with business strategy and support diversity initiatives.

EDUCATION

FORDHAM UNIVERSITY

Anticipated May 2028

Master of Business Administration (MBA)

DREXEL UNIVERSITY

Graduated December 2021

Bachelor of Science in Business Administration

- Honors and Awards: Major: Finance, Minor: Legal Studies

EXPERIENCE

BROWN BROTHERS HARRIMAN

Project Analyst

Jul 2023 - May 2026

- Led cross-functional projects to implement system/product upgrades, aligning technology solutions with business strategy
- Collaborated with vendors/internal stakeholders to onboard banking products, ensuring alignment with client objectives
- Served as Subject Matter Expert for product demos and client training, supporting adoption and change readiness
- Conducted business requirements gathering and User Acceptance Testing (UAT) to improve user experience for products
- Managed Agile and Waterfall project lifecycles, driving engagement and clear communication for internal/external users
- Produced executive reports highlighting key project milestones, behavioral adoption challenges, and leadership recommendations

JP MORGAN CHASE & CO.

Data Quality Analyst

Jan 2022 - Jun 2023

- Monitored and resolved data quality issues within Wholesale Risk applications to drive operational improvements
- Analyzed and published weekly reports highlighting metric breaches, communicating data anomalies to senior leadership
- Reviewed and certified data sets and lineage to improve completeness, timeliness, and accuracy in risk-related applications
- Designed and built Tableau dashboards to track data risk projects in partnership with internal teams and project managers
- Supported Diversity, Equity, and Inclusion initiatives by conducting internal research to improve recruitment and training

JP MORGAN CHASE & CO.

Intern | Financial Control

Apr 2020 - Sep 2020

- Maintained integrity of financial statements by reconciling PnL aggregators for accurate general ledger reporting
- Updated daily trading summaries and settlement documents to ensure validity and accuracy of the general ledger
- Automated variance detection by building Excel macros to flag PnL discrepancies across lines of business
- Partnered with corporate treasury teams across multiple regions to discuss month-end reporting and data variances

KOHLBERG KRAVIS ROBERTS & CO.

Intern | Private Equity - Internal Audit

Mar 2021 - Sep 2021

- Performed internal audit tests to reconcile KKR Board of Directors data against Compliance reports, ensuring accurate firm expenses
- Executed and led annual Sarbanes-Oxley (SOX) testing for entity-level controls using the AuditBoard platform
- Created detailed corporate finance control tests using trading data to satisfy firm compliance requirements

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Intern | Supply Chain Distribution & Management

Apr 2019 - Sep 2019

- Scheduled and confirmed high-volume shipments via B2B platforms for major retailers (e.g., Bloomingdale's, Macy's)
- Investigated shortage/overage discrepancy claims for external audit purposes in partnership with Global Finance and KPMG
- Generated Excel charts and summarized logistical data to enable management tracking of outgoing shipments

ADDITIONAL

General: Charles River IMS (CRIMS), Charles River Everywhere (CRE), AuditBoard, Addepar, Pivotal CRM, Box.com, JIRA, qTest, Tableau, Microsoft Excel (Advanced), Microsoft Access, Microsoft Word, PowerPoint, Visio, Teams, SharePoint

Soft Skills: Collaboration, Project Management, Change Management

Languages: not specified

Industries: Finance, Banking, Private Equity, Supply Chain

Career Interests: Business Analysis, Risk Management, Data Quality