Yogendra P Sharma

STRATEGIC FINANCE & BOARD ADVISORY

INSTITUTIONAL LIAISON AND FINANCIAL COORDINATION

Prepare Precisely. Engage Credibly. Close Responsibly.

FOR INDIAN SMEs AND INDIAN SUBSIDIARIES OF GLOBAL COMPANIES

Connect accurate financial information, clear documentation and informed negotiation with banks, statutory departments, government bodies, auditors, investors and specialist professionals.

India-Focused

REGULATORY ENVIRONMENT

Finance-Led

DATA & DOCUMENTATION

End-to-End

FOLLOW-UP & CLOSURE

Professionally

COORDINATED WHERE REQUIRED

DISCUSS A COORDINATION MANDATE

Clear facts. Credible engagement. Documented closure.

STAKEHOLDER LANDSCAPE

One financial narrative across multiple institutions

Each stakeholder asks different questions. The finance leader keeps the facts, submissions and commitments consistent.

Tax & Statutory Departments

GST, Income Tax, TDS, EPFO, ESIC, labour authorities and related compliance offices.

Corporate & Regulatory Bodies

MCA/ROC, RBI/FEMA, SEBI and stock-exchange interfaces where applicable.

Financial Institutions

Banks, NBFCs, lenders, credit-rating agencies, trustees and other funding stakeholders.

Assurance & Professional Partners

Auditors, legal counsel, company secretaries, tax specialists and valuers.

Government & Local Authorities

Registrations, incentives, subsidies, approvals and relevant industry departments.

Capital & Transaction Partners

Investors, PE funds, merchant bankers, due-diligence teams and transaction advisers.

Global Parent & Group Teams

Parent finance, treasury, legal, tax, compliance and consolidation stakeholders.

Internal Business Functions

Finance, legal, HR, operations, procurement, sales and leadership teams.

No approval is assured. Specialist opinions and certifications remain with practising professionals.

LIAISON CAPABILITIES

Finance-led coordination from preparation to closure

01

Tax & Statutory Coordination

Reconciled data, submissions, explanations and response tracking for GST, Income Tax, TDS, labour and related matters.

02

Banking & Working Capital

CC/OD, term loans, renewals, enhancements, security documentation, covenants, stock statements and operational issues.

03

Fundraising & Lender Negotiation

Financial case, information memorandum, projections and negotiation position for debt, refinancing and structured funding.

04

Corporate, Regulatory & Audit Interface

Finance-data readiness and execution for ROC, RBI/FEMA, SEBI, statutory audit and due diligence.

05

Government Approvals & Incentives

Finance-linked registrations, applications, incentives, subsidies, certifications and authority follow-up.

06

Issue Resolution & Governance

Ownership, meeting briefs, action trackers, escalation routes, written records and disciplined closure.

No approval is assured. Specialist opinions and certifications remain with practising professionals.

PROFESSIONAL BOUNDARIES

Direct financial leadership, specialist opinions where required

LED DIRECTLY

Finance, Documentation & Negotiation

- Financial analysis and position preparation
- Data validation and document readiness
- Banking and fundraising negotiations
- Meetings, responses and follow-up
- Commitment and covenant tracking
- Internal coordination through closure

PROFESSIONALLY COORDINATED

Legal, Certification & Reserved Practice

- Legal opinions and representations
- Professional certifications and attestations
- Companies Act and secretarial practice
- Specialist tax, FEMA, RBI and SEBI opinions
- Valuation and regulated assurance work
- Litigation and formal legal proceedings

MANDATE TOOLKIT

- FINANCIAL INFORMATION PACK
- INFORMATION MEMORANDUM
- SUBMISSION & RESPONSE FILE
- MEETING & NEGOTIATION BRIEF
- ACTION & COMMITMENT TRACKER
- INSTITUTIONAL DATA ROOM

No approval is assured. Specialist opinions and certifications remain with practising professionals.

CONTROLLED EXECUTION

Move each matter from preparation to documented closure

01 PREPARE	Validate facts, reconcile data and assemble documents.
02 POSITION & PRESENT	Build the financial narrative and agree negotiation boundaries.
03 COORDINATE & RESOLVE	Manage queries, professional inputs, actions and alternatives.
04 CLOSE & SUSTAIN	Record approvals, commitments and evidence; monitor conditions.

BUSINESS OUTCOMES

Faster responses

Complete submissions reduce clarification cycles.

Negotiation readiness

Facts and scenarios improve credibility.

Clear accountability

Owners and commitments remain visible.

Reduced risk

Documented follow-up protects obligations.

Coordinate with clarity. Close with governance.

DISCUSS A COORDINATION MANDATE

Yogendra P Sharma | Strategic Finance & Board Advisory | www.yogendra.org

No approval is assured. Specialist opinions and certifications remain with practising professionals.