
Joshua Samuel

Chartered Accountant ♦ Business Solutions Strategist ♦ Technology Entrepreneur

FCRA & TAX ADVISORY • PROCESS RE-ENGINEERING • FP&A • ERP & ANALYTICS

“The best work happens when rigour meets purpose — when strong systems serve real people and create lasting outcomes.”

♦ WHO I AM

I am a qualified Chartered Accountant with 19+ years of experience spanning global banking, social enterprises, and technology. I work with businesses, NGOs, startups, and founders — delivering precision-driven financial expertise with the strategic lens of a transformation leader and the hands-on delivery of a technologist. My work is organised across ten service areas — each one built to solve a real problem, deliver a measurable outcome, and give you the clarity to move forward with confidence.

Multiple Services. ♦ One Expert. ♦ Every Outcome You Need.

♦ SERVICES

1 Financial Planning & Analysis

Turn numbers into decisions. Turn decisions into growth.

Most businesses have data. Very few have clarity. I bridge that gap — delivering sharp financial intelligence that drives strategy, not just reporting. From rolling forecasts and scenario modelling to board-ready MIS dashboards and working capital management, I build FP&A systems that give leadership teams the confidence to act fast and act right.

Rolling forecasts ♦ Scenario modelling ♦ Board-ready MIS ♦ Cash flow management

From spreadsheet chaos to strategic clarity — FP&A done the way it should be.

2 Process Optimisation

Your biggest efficiency gains are hiding in plain sight.

Using Lean and Six Sigma techniques, I help organisations cut waste, eliminate bottlenecks, and build operations that scale — without burning people out. I map your end-to-end processes, surface the friction, and redesign how work flows — backed by SOPs, governance controls, KPIs, and the right dose of smart automation. The result: leaner teams, stronger controls, and work that actually matters.

Process mapping ♦ SOPs & documentation ♦ KPIs & governance ♦ Smart automation

Better processes aren't about doing more — they're about doing the right things, right.

3 Business Modelling

Your idea is only as strong as the model behind it.

I help founders, entrepreneurs, and organisations turn bold ideas into structured, defensible commercial frameworks — ones that survive investor scrutiny and guide smart decisions. Multi-year projections, unit economics, sensitivity analysis, scenario planning — built to withstand the toughest questions in any boardroom or investor meeting.

Multi-year projections ♦ Unit economics ♦ Sensitivity analysis ♦ Scenario planning

Whether you're pre-revenue or scaling — I build the model that makes your case.

4 FCRA Registration & Advisory

Foreign funding starts with the right compliance foundation.

FCRA registration is a critical — and often complex — milestone for NGOs, trusts, societies, and Section 8 companies. I take you from eligibility assessment through documentation preparation, portal filing, compliance structuring, and MHA follow-up — so you arrive at approval without confusion, gaps, or delays. Done right, FCRA registration unlocks global funding, international grants, and cross-border partnerships that transform your organisation's reach.

Eligibility assessment ♦ Documentation prep ♦ Portal filing ♦ MHA follow-up

The right compliance foundation opens doors that stay open.

5 Audit & Compliance

Precision. Independence. Peace of mind.

Compliance is not a checkbox — it is a foundation. I bring risk-based internal audits, investigation audits, and statutory compliance reviews that go far beyond ticking boxes. I identify control gaps before regulators or incidents do, build audit frameworks that scale with your organisation, and give your board and stakeholders the confidence that comes from genuine rigour.

Internal audits ♦ Investigation audits ♦ Controls assessment ♦ Statutory compliance

Strong audits don't just find problems — they build lasting confidence.

6 Income Tax Filing & Advisory

Compliant today. Optimised for tomorrow.

Tax is not just about filing — it is about strategy. I handle end-to-end income tax compliance for individuals, businesses, LLPs, and corporates — while identifying every legitimate opportunity to reduce your tax burden year-round. From ITR filing and TDS compliance to tax assessment representation and cross-border taxation, I keep you ahead of every deadline and every liability.

ITR filing ♦ Tax planning ♦ TDS compliance ♦ Assessment representation

Tax done right is tax done early — with strategy, not scramble.

7 GST Filing & Advisory

No confusion. No penalties. Just clean compliance.

GST is complex, dynamic, and relentlessly detailed. I simplify it — keeping your returns accurate across GSTR-1, GSTR-3B, and GSTR-9, your input tax credits maximised, and your business ahead of every notification and regulatory change. From GST registration and reconciliation to RCM handling and advisory on new transactions, I ensure your GST position is always clean, compliant, and penalty-free.

GST registration ♦ Return filing ♦ ITC optimisation ♦ RCM handling

GST compliance isn't optional — expert GST advisory is what separates reactive from ready.

8 Investor Decks & Pitch Support

Your vision deserves a narrative that commands attention and earns trust.

I help founders and organisations turn bold ideas into investor-ready financial stories — from the opening slide to the closing ask. Crisp pitch decks, comprehensive investor booklets, executive teasers, and Q&A preparation that anticipates the tough questions before the room does. The numbers speak with clarity. The story lands with conviction.

Pitch decks ♦ Investor booklets ♦ Executive teasers ♦ Q&A prep

First round or Series B — I make sure investors lean in, not switch off.

9 ERP Solutions

The right ERP doesn't just run your business — it transforms it.

I help businesses select, implement, and extract full value from ERP systems — with a strong preference for open-source and right-sized platforms over bloated, over-engineered ones. From needs assessment and vendor selection to configuration, data migration, integrations, training, and go-live support — I take a process-first approach that ensures your ERP actually works the way your business works, not the other way around.

ERP selection ♦ Implementation ♦ Integrations ♦ Training & go-live

ERP should simplify your business — not become a business in itself.

10 Analytical Insights

Data is everywhere. Insight is rare. Strategy is everything.

I transform raw data into sharp, actionable intelligence — combining finance expertise, process knowledge, and technology tools including Tableau, Power BI, and Dataiku to give you the clarity to act with confidence. From automated MIS dashboards and scheduled reporting to advanced analytics and data architecture advisory — I build the intelligence layer your business deserves.

MIS dashboards ♦ Tableau & Power BI ♦ Automated reporting ♦ Data architecture

The right insight at the right time changes everything.

◆ CREDENTIALS

Chartered Accountant — ICAI, 2006 | B.Com (Honours), University of Delhi

Nearly two decades of delivery across Standard Chartered Bank, ANZ, HSBC, GE Healthcare, and World Vision — recognised with multiple awards for leadership and business excellence, and a published white paper on ServiceNow.

Credentials matter. Results matter more. Let the work speak.

◆ WHO I WORK WITH

Enterprises & Corporates

Finance transformation, FP&A, and process optimisation

Startups & SMEs

Financial modelling, investor decks, ERP, and operational structuring

NGOs & Social Enterprises

FCRA advisory, automation, governance, and donor-impact platforms

Founders & Entrepreneurs

Business models, investor booklets, and venture financial strategy

Let's Build Something That Lasts

A challenge to solve. A venture to structure. A system to build.

Let's talk — and make it happen.

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