

# Curriculum Vitae

## Personal Profile

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*Date of birth* July 8 1985  
*Nationality* Swiss, Austrian



## Work Experience

*10.2017 - today*

**Prospera-Invest Vermögensverwaltung AG**, Zurich, Switzerland  
Founder, Partner & Chief Investment Officer (CIO)

- Independent wealth planning, investment advice and asset management for private individuals and institutional clients
- <https://www.prospera-invest.ch/en/>

*08.2015 - 05.2017*

**BlackRock Asset Management Schweiz AG**, Zurich, Switzerland  
ETF and Indexinvestments (EII) Switzerland

- Strategic coverage and build out of Private Banking client book and online platform business with individual asset and project targets
- Sales support function for Tier 1 accounts/coverage of junior peers e.g. fund research, portfolio management and trading/execution
- Independent management of key client reporting, RfP requests and data management

*03.2014 - 06.2016*

**REFUND SUISSE AG**, Bottighofen, Switzerland  
Member of the Board of Directors

*11.2013 - 01.2015*

**REFUND SUISSE AG**, Bottighofen, Switzerland  
*Co-founder and CFO, Head of Marketing and Sales*

- Digital service provider for VAT-Refund
- Set-up of the institutional client portfolio in Germany and Austria
- Responsible for capital raising, Investor Relations, Accounting and Financial Reporting
- Hiring, educating and leading of employees in the Marketing and Sales team

*02.2012 - 08.2012*

**CREDIT SUISSE AG**, Zurich, Switzerland  
*Internship Investment Banking*  
FX Derivatives Sales & Precious Metals Premium Clients

- Writing monthly/weekly reviews for external clients, composing sales statistics

- Execution of FX and Money Market Transactions for external and internal clients
- Building of option pricing models in MS Excel
- Pricing of plain vanilla and tailored options and other FX/PM related derivatives

*09.2010 - 01.2011*

**CREDIT SUISSE AG**, Wil (SG), Switzerland  
*Internship Private Banking*

- Supporting Relationship Managers in coordinating and organisational tasks
- Active consultation, liaison and support of private clients in investment, financing and pension related decisions
- Planning/participation of/at company meetings and composing presentations

*08.2001 - 07.2004*

**AXA WINTERTHUR**, St. Gallen, Switzerland  
*Apprenticeship as Commercial Clerk*

## **Education**

*06.2018*

**CFA INSTITUTE**  
*Chartered Financial Analyst (CFA)*

*02.2011 - 05.2015*

**UNIVERSITY OF ST. GALLEN (HSG)**, St. Gallen, Switzerland  
*Master in Accounting and Finance (MAccFin)*  
Major: Finance

*09.2007 - 07.2010*

**University of Applied Science (FHO)**, St. Gallen, Switzerland  
*Bachelor of Science in Business Administration (BSc FHO)*  
Major: Corporate Finance

*09.2005 - 08.2006*

**KBZSG**, St. Gallen Switzerland  
Business College, Professional Maturity

## **Informatics**

*Proficient*

Bloomberg, MS Office

*Competent*

Reuters, MM4XL and XSTAT for MS-Excel

## **Languages**

*German*

Mother tongue

*English*

Fluent

## **Further Information**

*References*

Upon request