

Curriculum Vitae

Personal Profile

Surname Chevrolet
Name Marcel
Street Albisstrasse 118a
Zip / City 8038 Zurich
Mobile +41 79 413 19 77
E-Mail chevrolet@prospera-invest.ch
Date of birth December 12 1959
Nationality Swiss, Mexican



Work Experience

07.2017 - today

Prospera-Invest Vermögensverwaltung AG, Zurich, Switzerland
Partner & Chairman of the Board of Directors

- Independent asset management for private individuals in Switzerland
- Portfolio Management & Customer Care
- AML, Compliance & Risk Control
- www.prospera-invest.ch

05.2014 - today

Chevrolet Consulting GmbH, Zurich, Switzerland
Owner & CEO

- Pension planning and tax optimization of pension assets from the pension fund and Pillar 3a
- Pension advice when changing jobs or losing a job
- Financial advice when leaving Switzerland

12.2010 - 09.2012

NEUE PRIVAT BANK AG, Zurich, Switzerland
Senior Client Relationship Manager

- Acquisition and support of private and corporate banking clients in Switzerland and Eastern Europe

05.2009 - 11.2010

EFG BANK, Zurich, Switzerland
Senior Client Relationship Manager

- Acquisition and support of private and corporate banking clients in Switzerland and Eastern Europe

02.2005 - 04.2009

COMMERZ BANK (SCHWEIZ) AG, Zurich, Switzerland
Director Private Banking Central & Eastern Europe

- Acquisition and support of corporate and private customers
- Establishment and support of the EAM desk
- Member of the Investment Committee

12.1999 - 01.2005

BNP PARIBAS (SCHWEIZ) AG, Basel, Switzerland
Team Head Private Banking «Rest of the World»

- Acquisition and support of private banking clients, EAM's and intermediaries in Switzerland, Germany, Argentina and Eastern Europe
- Establishment and operation of portfolio management with «best in class» funds»
- Representation of the bank at trade fairs and congresses

09.1992 - 11.1999

BANK SARASIN & CIE, Basel, Switzerland
Head of Sales Sarasin Investment Fonds

- Establishment and responsibility for sales in Germany and Austria via EAM's, intermediaries, banks and insurance companies
- Establishment and management of the investment fund call center
- Responsible for budget, P&L and key accounts Germany
- Representation of the bank at international trade fairs and congresses

03.1985 - 07.1992

01.1989 - 07.1992

SWISS BANK CORPORATION (UBS)

UBS Mexico: Assistant Representative, Acquisition and support of corporate and private customers, support of corporate banking activities, representative of the representative

06.1987 - 12.1988

01.1986 - 07.1987

03.1985 - 08.1986

UBS Zurich: Head Quarters, Portfolio manager Clients Middle East

UBS Basel: Portfolio manager private clients Germany

UBS Basel: FIAT, financial internship, back office, stock exchange, investment advice and portfolio management

Education

1999

LANGUAGE STAY NICE

1995 - 1997

SWISS BANKING SCHOOL

08.1981 - 12.1981

EF INSTITUTE CAMBRIDGE

1978-1981

APPRENTICESHIP

Clerk at ASAG-Service AG, Basel

Languages

German

Mother tongue

English

Fluent

Spanish

Fluent

French

Very good

Further Information

References

Upon request