



ID-64306 Carlos

Work experience

BUSINESS DEVELOPMENT MANAGER

Jul 2022 - Present

SAFE BROK EUROPE, MADRID

Within SafeBrok Europe's Investment Department and reporting to the Deputy Managing Director:

- Member of the Company's Steering Committee.
- Independent and objective financial advice to both private and institutional clients according to their needs, risk/volatility levels and time objectives.
- Business Development Manager for the South of Spain (Madrid, Andalucia and Canary Islands).
- Responsible for the achievement of commercial objectives of 30 managers.
- Management of the ELBA Global Asset allocation fund. Equity Fund of Funds - Alpha positive. 340 participants and assets close to 20MM.
- Accompaniment with managers to HNI clients.
- Search for the best financial solutions in the market with the best providers: pension funds, mutual funds, insurance companies, investment funds, banks.

WEALTH MANAGER - ASSET MANAGER

Nov 2020 - Jun 2022

PATHWAY ASSET MANAGEMENT, Dubai - UAE

- Analyzing financial data received from HNI clients to develop strategies for meeting clients' financial goals.
- Advising strategies for clients in insurance coverage, investment planning, cash management, and other areas to help them reach financial objectives.
- Investigate available investment opportunities to determine compatibility with client financial plans
- Managing and updating client portfolios.
- Identifying practice management opportunities through various firm channels
- Current AUM \$17M

HEAD OF FINANCE EMEA

May 2019 - Sep 2019

VISUAL IMAGE, Barcelona, Spain

As a Head of Finance for a 5 month integration project my main responsibilities are:

- Maintaining and supervising management reports of the P&L and BS for the EMEA Business
- Maintaining projected costs and revenue predictions
- Primary point of contact for External Auditors & Investors
- Develop and review various finance and operational processes for all acquisitions and mergers
- Supervising the Implementation and kickoff of 2 CRMs (Trello & Salesforce) within the EMEA Offices (London, Barcelona, Valencia, Milan & Cairo)
- Establishing and overseeing appropriate coding of all income revenues and outgoing expenditure
- Develop and deliver an integration program to ensure long term value
- Maintaining projected costs and revenue predictions in the P&L
- Establishing and maintaining financial recording and reporting using Xero, but playing a key role in migrating the Company to NetSuite

WEALTH MANAGER - TEAM MANAGER

May 2014 - Dec 2020

OVB ALLFINANZ ESPAÑA, MADRID, SPAIN

As a Wealth - Team Manager the most important roles I take part in are:

- Permanent understanding and following of the Investing Institutions, both Banking Institutions and Insurance Companies
- Advising clients on portfolio management, asset allocation, wealth structuring. tax optimization and other investments
- Developing and supervising financial plans to clients in order to meet and exceed their expectations.
- Monitoring performance and initiating action to strengthen results
- Leading multitasking teams of up to 20 people, coordinating their functions and deadlines in order to achieve always the best outcome

Personal details

Name

Carlos

Address

MADRID, 28042

Phone number

Email

Additional info

Gender

Male

Date of birth

03/09/1988

Place of birth

Madrid, Spain

Nationality

Spanish

Languages

Spanish



English



French



Catalan



Education and Qualifications

EUROPEAN FINANCIAL ADVISOR

EFPA, SPAIN

Sep 2017 - May 2018

Commercial Pilot License

SilverWings Avistion Academy, San Juan de Puerto Rico

Sep 2012 - Mar 2014

Degree in Economics

UNED, Madrid

Sep 2008 - Jun 2012

International Baccalaureate Diploma

Impington Village College, Cambridge, UK

Sep 2004 - Jun 2006

Skills

Microsoft word



Microsoft Excel



Negotiation Skills



Interpersonal Skills



Xero



Salesforce



Bloomberg

