



**UNIVERSITÉ  
DE GENÈVE**

GENEVA SCHOOL OF ECONOMICS  
AND MANAGEMENT

**GENEVA FINANCE**  
RESEARCH INSTITUTE

## **MASTER OF SCIENCE IN WEALTH MANAGEMENT**

### **BOOKLET STUDENTS 2018/2019**



*UNIGE - Photographe : Isaac Fefermann*

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## EDUCATION

Master in Wealth Management  
Université de Genève  
Sept 18 – to date

Chartered financial Analyst (CFA)  
CFA Institute  
2018

Industrial Engineering - Bachelor Degree  
Universidad Iberoamericana (IBERO), Mexico.  
Aug 2007 – Dec 2011

## EXPERIENCE

**Fixed Income & Derivatives Analyst**  
Casa de Bolsa Finamex  
Oct 17 – June 18

- Research new investment ideas for proprietary trading.
- Monitor swaps curve of existing holdings to assess continued exposure.
- Execute fixed income & derivatives transactions for wealth managers.
- Continuous improvement in the areas of fixed income & derivatives trading systems.

**Risk Analyst Sr.**  
Casa de Bolsa Finamex  
June 16 – Sept 17

- Analyze market positions and run modelling techniques to find value at risk (VAR) and present a daily report to management.
- Conduct statistical analysis and use valuation tools to assess the severity of risk.
- Work with traders to monitor risk exposure.

**Equity Strategy Analyst**  
Casa de Bolsa Finamex  
July 2015 – May 2016

- Strategic equity allocation in accordance to the mandate of each portfolio.
- Monitor and identify the driving factors of equity markets; macroeconomic view, industry trends and stocks fundamental factors.
- Build investment thesis for stock picking mainly in Mexican and US equity markets, based on fundamental factors, technical indicators and markets sentiment.

**Management Analyst**  
Casa de Bolsa Finamex  
March 2014 – June 2015

- Develop a monthly summary about the world economic events that impacted the financial markets.
- Develop Excel tools to calculate investment portfolio returns and analyze future projections.
- Support wealth managers with analysis and presentations for clients.

**Projects Analyst**  
DuPont Mexico  
Jan 2011 – Jan 2014

- Improve mid-term business planning accuracy.
- Develop Six Sigma Projects to optimize costs and working capital.

## PERSONAL SKILLS

### *Languages*

Spanish - Full Professional Proficiency  
English - Full Professional Proficiency (TOEFL IBT 108)

### *Software*

Microsoft Office and Bloomberg

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## EDUCATION

MSc. Wealth Management 2018 - 2020  
*University of Geneva, Switzerland*  
Relevant Coursework: Financial Econometrics,  
Stochastic Processes in Finance, International Capital  
Markets Law, Introduction to the Law of Trusts,  
iTrek Startup Project.

BSc. Physics 2014  
*Universidad de los Andes, Colombia*  
GPA: 4.4/5.0  
Thesis: Spontaneous Symmetry Breakdown. An Algebraic Approach.

## EXPERIENCES

**Trustee** 2017 - 2018  
A.A. Trust Fund, Colombia

**Data Science & Ideation Competitor** 2016 - 2017  
TopCoder Inc., Remote

**Web Developer** 2016 - 2017  
Credinales S.A.S / SEACOR S.A. E.S.P, Colombia

**Full-Stack Developer** 2015  
Cayero GbR, Germany

**Scientific Assistant Non-Linear Dynamics** 2015  
Ludwig-Maximilians-Universität München, Germany

## PERSONAL SKILLS

Driven and hard working, with excellent communication and interpersonal skills. Successful at providing additional value to the firm and the team division.

### *Languages*

*Spanish:* Native Speaker, *English:* Fluent, *German:* B1

### *Computer Skills*

Microsoft Office (Excel, Word, Powerpoint)  
iWork (Numbers, Pages, Keynote)

### *Programming Languages*

*Data Science:* Python, Matlab, C++

*Web Development:* JavaScript, HTML, CSS, jQuery, Bootstrap, AngularJS

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## EDUCATION

Programme Master of Science in Wealth Management University of Geneva, Switzerland	2018-2020
Préparation aux examens du DELF (B2) Cilfa Centre International de Langue Française d'Annecy	11.2017 - 05.2018
Bachelor of Economics (Major– finances and credits) Saint-Petersburg State University of Economics	2013 - 2017
Erasmus program, Economics University of Economics, Prague	02.2016-07.2016

## EXPERIENCES

Russian Agricultural Bank <b>Leading Legal Advisor</b> <ul style="list-style-type: none"><li>• Giving a legal opinion on mortgages</li><li>• Preparing claims/lawsuits to the courts of general jurisdiction</li><li>• Presenting interests of the bank before the court</li></ul>	06.2018 - 08.2018
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APPEN, global leader in the development of high-quality, human-annotated datasets for machine learning and artificial intelligence, <a href="https://appen.com/">https://appen.com/</a> <b>Social Media Evaluator, Independent consultant</b> <ul style="list-style-type: none"><li>• Evaluation of web contents</li><li>• Reviewing web contents</li><li>• Analyzing more than 600 advertisements per month</li></ul>	02.2017-09.2017
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Unecon Buddy Program, Saint Petersburg State University of Economics Buddy <b>Event Manager</b> <ul style="list-style-type: none"><li>• Meeting more than 100 Erasmus students from all around the world at the airport</li><li>• Organization of the cultural and entertainment events (minimum 2 events per month)</li></ul>	2013-2017
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## INTERNSHIPS

BURINTEKH, Scientific and production enterprise, Ltd. Leading Russian developer and manufacturer of high-quality competitive tools for well drilling and workover operations, <a href="http://burintekh.com/">http://burintekh.com/</a> Internship at the department of economics <ul style="list-style-type: none"><li>• Analysis the financial stability of the enterprise with more than 2000 of staff Development of the investment project</li><li>• Creating a budget for the 14,5 million rubles investment project</li><li>• Evaluation of the investment project with different methods</li></ul>	03.2017 – 05.2017
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BAZAR, Folk Art Gallery, Saint-Petersburg Internship at the department of sales <ul style="list-style-type: none"><li>• Communication with the clients and suppliers</li><li>• Explication of the value of the items (historical value, hand-made, etc.)</li><li>• Sale of the unique items (amber, Faberge, gold, pearls...)</li></ul>	12.2016
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W hotel, Saint-Petersburg <ul style="list-style-type: none"><li>• Reception duties</li><li>• Phone calls to the guests of the hotel</li><li>• Booking of the rooms</li></ul>	07.2015
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### **INTERNSHIPS (CONT)**

Children Camp at the school, Ufa  
Kindergartener

07.2012

- Taking care of kids
- Organization of the sportive and cultural events

### **PERSONAL SKILLS**

- Microsoft office, Excel, Word, Power Point, Photoshop
- Solid knowledge and hands-on experience of financial models and tools
- The capacity of quick adaptation to the multicultural environment
- Leadership (Coordination and management of multicultural projects)
- Quick learner
- Energetic and well-organized
- Communicative
- Driver's license B

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## EDUCATION

Master of Science in Wealth Management University of Geneva, Switzerland	2018 – 2020
Complementary Program ahead of the Msc WM University of Geneva, Switzerland	2017 – 2018
Bachelor of Business Administration Glion Institute of Higher Education, Switzerland	2011 – 2015
Bachelor of Science in Hospitality Management with specialization in Finance <i>Les Roches-Gruyère University of Applied Sciences, Switzerland</i>	2011 – 2015
French Baccaalaureat S <i>French International High School, USA</i>	2009 – 2011

## EXPERIENCES

Ernst & Young, Geneva, Switzerland <b>Audit Assistant, EMEIA Financial Service Assurance</b>	2015 – 2017
Marriott International, Dubai, UAE <b>Cluster Inventory Support Intern in Revenue Management</b>	2013 – 2013
Grand Hotel du Lac, Vevey, Switzerland <b>Banqueting Assistant</b>	2012 – 2012
Humanitarian Volunteer, Phnom Penh, Cambodia <b>Vulnerable Children Assistance Organization (teacher)</b>	2009 – 2009

## COMPUTER SKILLS

Matlab, MS Office, Stata, Basic level: Docubase, Atlas, Olympic, Thomson Reuters

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## EDUCATION

Geneva Master in Wealth Management (GEMWEM) <i>University of Geneva, Switzerland</i>	2018-Present
Bachelor in Economics and Management (Major in Management) <i>University of Geneva, Switzerland</i>	2014-2018
Exchange semester at the Telfer School of Management <i>University of Ottawa, Canada</i>	Fall 2017
French Baccaulaureate with distinction (Major in Science) <i>Lycée Saint-Michel, Annecy (France)</i>	2011-2018

## EXPERIENCES

<b>Tutor at Association des Répétiteurs Ajeta (ARA)</b> <i>Private tutoring to high school students</i>	2017-Present
<b>Salesperson at H&amp;M (Annecy)</b> <i>Cash register handling, customer advising, receipts of packages and orders</i>	Summer 2018
<b>Salesperson at Promod (Annecy)</b> <i>Cash register handling, customer advising, receipts of packages and orders</i>	Summer 2017
<b>Head of the HR department of the Junior Entreprise Genève</b> <i>In charge of semestrial recruitments, member training and well-being, team management</i>	2016-2017
<b>Member of the HR department of the Junior Entreprise Genève</b>	2015-2016

## PERSONAL SKILLS

### *Languages*

French: Mother tongue

English: C1 Level

TOEFL Score: 109/120 (Reading : 28/30, Listening : 25/30, Speaking : 29/30, Writing : 27/30)

Spanish

Basic knowledge

### *Computer tools:*

Microsoft pack (Word, Excel, PowerPoint)

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## EDUCATION

MSc in Wealth Management University of Geneva, Switzerland	2018 - 2020
Master of International Affairs; Trade & international finance Graduate Institute of International Studies, Switzerland	2016 - 2018
Exchange programme University of Ghana, Ghana	08-12. 2017
Bachelor of Arts; International relations University of Geneva, Switzerland	2010 - 2013

## EXPERIENCES

<b>Project Management Intern</b> <i>University of Geneva, Switzerland</i>	01-02. 2017
<b>Foreign Affairs Intern</b> Royal Norwegian Embassy in Sofia, Bulgaria	01-06. 2016
<b>Junior Consultant</b> Norwegian Labour & Welfare Administration, Norway	2015-2016
<b>Sales Representative</b> Boksentralen ASA, Norway	2014-2015

## PERSONAL SKILLS

Presentations, public speaking, sales

STATA, SPSS; MATLAB; EXCEL; Python



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## EDUCATION

University of Geneva, Switzerland M.Sc Wealth Management	Sep 2018 – n.d.
Rhine-Waal University of Applied Sciences, Kleve, Germany M.Sc. Economics and Finance	Feb 2016 – Aug 2018
Europäische Fachhochschule (EUFH), Brühl, Germany European Business Management, Semestre Program	Sep 2015 – Jan 2016
Plekhanov Russian Economic University, Moscow, Russia M.Sc. Economics	Sep 2013 – Jul 2015
Plekhanov Russian Economic University, Moscow, Russia B.A. World Economy	Sep 2008 – Jul 2013

## EXPERIENCES

**Claim Controller / Document Processing** Jul 2013 – Mar 2015  
 Panalpina CIS Helsinki OY RO, Derbenevskaya naberezhnaya 7 bldg 9  
 Business Centre "Novospasskiy Dvor" 115114 Moscow, Russia, <http://www.panalpina.com>

- Managing operational data, optimizing and streamlining document process;
- Working in corporate operational systems such as SAP, IDS, SCP, IPW;
- Dealing with ocean freight forwarders and subcontractors' concerning all necessary documents for international transport operations;
- Checking and accepting invoices from subcontractors side;
- Issuing invoices for customers;
- Providing reports for senior managers;
- Leading and directing junior members of staff (internes);
- Claim controlling;

**Senior Specialist of Government Procurement** Feb 2013 – Jul 2013  
 Plekhanov Russian University of Economics, Stremyanny lane , 36,  
 117997, Moscow, Russia, [www.rea.ru](http://www.rea.ru)

- Providing documents for participation in open auctions in electronic form in order to supply the university with necessary goods and services;
- Publishing government tenders on the official website <http://zakupki.gov.ru>;
- Preparing all necessary documents for signing contracts with suppliers;

## PERSONAL SKILLS

Mother tongue(s) Russian

Other language(s)	UNDERSTANDING		SPEAKING		WRITING
	Listening	Reading	Spoken interaction	Spoken production	
ENGLISH	C 1	B 2	B 2	B 2	B 2
IELTS 6.0					
GERMAN	B 2.1	B 2.1	B 2.1	B 2.1	B 1.1
INSTITUT FÜR INTERNATIONALE KOMMUNIKATION (IHK), B 1.1					
FRENCH	B 1	B 1	B 1	B 1	A 2.2

### Communication skills

Strong communication skills which were obtained through collaboration with clients and suppliers in the process of providing shipping services as well as dealing with claims from clients.

### Organisational / managerial skills

Managerial experience was gained through taking responsibility for the training two new staff members, who became a valuable part of the junior team of the company. This experience also revealed a stronger side of my character which helped me to deal with challenging situations under high pressure and with strict deadlines, but at the same time remaining easy-going and flexible.

### Computer skills

- good command of office suite (MS Word, MS Excel, MS Power Point)
- good command of statistical package of Windows – MATLAB, R

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## EDUCATION

Msc Wealth Management 2018 - 2020  
University of Geneva, Switzerland

Undergraduate Exchange Program 09.2017 - 01.2018  
*York University Toronto, Canada*

Bachelor in Economics and Management 2014 - 2017  
*University of Geneva, Switzerland*  
[Major : Management ; Minor : Finance&Accounting – 4.9/6 average]

English Certificates 01.2014 – 07.2014  
*University of California San Diego (UCSD), USA*

## EXPERIENCES

Lombard Odier & Cie Private Bank, at Geneva 02.2018 – 07.2018  
**Employee in the group Perception of the Operations department.**

- Dividend, interest and reimbursement payments for instruments of the US and Canadian market through internal software.
- Control of financial information (record date, value date, ex-date, taxation...)
- Solving claim issues with external private/investment banks

Lombard Odier & Cie Private Bank, at Geneva 06.2016 - .07.2016  
**Summer internship** at the Lombard Odier Private Bank, in the Logistics department and more specifically in the "Purchasing" section. My responsibilities consisted in listing the suppliers of the bank under source codes, sorting them by field of activity and finally, proposing a plan to improve the classification process of these same suppliers.

- Wide use of Excel software
- Basic handling in SAP

GSEM Committee, at University of Geneva 04.2016 - .06.2017  
**Member of the representative student association** of the GSEM faculty.  
I held the position of "Recruitment Manager" and managed in parallel the "Sports & Leisure" division of the association.

SwissDoc S.A, at Geneva. 02.2016 - 06.2016  
I worked as an **Account Manager** at SwissDoc S.A, an internet platform which references professionals in the medical field and offers online appointments making.

- Appointments making
- Telephone prospecting
- Electronic mailing

## PERSONAL SKILLS

### Real communication skills

French - Mother tongue  
English - Very good level  
Spanish - Good knowledge  
Portuguese – Basic knowledge

### Socially oriented & cultural understanding

Pleasant and sociable character  
4 months in Canada – 2 months in Brazil – 1 month in Thailand – 7 months in USA

### Rapid adaptation

Perfectionist, involved, dynamic, autonomous.

### Sports

Basketball, Football, Badminton, Ski, Triathlon

### Software

Excel (Microsoft Office by large)  
Settlement, g2, EventCalendar, OST2 (Internal Lombard-Odier software)

### Finance and accounting interest

Average of 5 out of 6 in the Finance and Accounting's minor of my bachelor.  
(6.0 in Real Estate, 6.0 in Private Bank in Practice, 5.75 in Corporate Finance...)  
Several recommendation letters from professors

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## EDUCATION

MASTER IN WEALTH MANAGEMENT University of Geneva, Geneva, CH	2018-2020
SUMMER SCHOOL Education First (EF), Miami, US	Mars-June 2018
CFA LEVEL 1 SUCCESS (chartered financial analyst)	December 2017
BACHELOR IN ECONOMICS AND MANAGEMENT University of Geneva, Geneva, CH <ul style="list-style-type: none"><li>• Bilingual Program</li><li>• Major in management</li><li>• Minor in economics</li></ul>	2014-2017
SCIENTIFIC BACCALAUREATE (obtain with honors) Berthollet high school, Annecy, FR	June 2014

## EXPERIENCES

<b>RISK MANAGEMENT MISSION (20%)</b> Cité Gestion Geneva, CH Research on external investment fund (due diligence)	October - December 2018
<b>TELEPHONIST-RECEPTIONIST (15%)</b> Bongénie Grieder Geneva, CH <ul style="list-style-type: none"><li>• Welcome and visitor information</li><li>• Switchboard</li><li>• Reception and checking of goods</li><li>• E-commerce Management</li><li>• Administrative tasks</li></ul>	2016-2018
<b>SALE CONSULTANT (20%)</b> Bongénie Grieder Geneva Airport, CH <ul style="list-style-type: none"><li>• Welcome and customer advice</li><li>• Relationship with international customers</li><li>• Realization and follow-up of sales</li><li>• Setting up merchandising</li><li>• Stock management and restocking</li><li>• Client file optimization</li><li>• Administrative management</li></ul>	2014-2016

## PERSONAL SKILLS

- Organized
- Dedicated
- Punctual
- Voluntary

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## EDUCATION

University of Geneva  
Master in Wealth Management Geneva, Switzerland, Sep/18-Jul/20

Bocconi University Milan, Italy Sep/15-Jun/18  
Bachelor of Science in International Economics and Finance  
GPA: 26/30

Classical High School of Zagreb Sep/10-Jun/14  
Zagreb, Croatia  
Matura (Croatian Bacculaureate)  
GPA: 4.7/5

## EXTRACURRICULAR EXPERIENCE

Croatian National Bank, Zagreb, Croatia Jul/17  
**Intern in Economic analysis department**  
• Comparative analysis of Croatian unemployment rate.  
• Familiarization with basic concepts of econometric models and financial modelling.  
• Study of Croatian unemployment rate.

**Auctions H.D. Rauch, Vienna, Austria** Jul/16  
Biggest auction house in Central Easer Europe with a specialisation in coins and gold trade.  
• Aiding in client acquisition and helping in product selection.  
• In charge of billing.  
• Organising and assisting at the annual summer auction.

**Numismatik Lanz, Munich, Germany** Jul/14  
Auction house focussing on antique coins.  
• Assisting with sales, shipping and delivery.  
• Acquiring an understanding of the business model of the auction house.  
• Manual data entry for inventory and web-shop.

**Women in Business Bocconi, Milan, Italy** Sep/16-Jun/18  
• Organize career-related and NGO events.  
• CV workshops.  
• Cooperating with major banks and start-ups.

**Bocconi Students Finance Society, Milan, Italy** Sep/16-Jun/18  
• Organize finance-related events and networking events.  
• Interacting with alumni network.  
• Discussions on recent topics of relevance.

## LANGUAGES, IT PROFICIENCY AND FURTHER INTERESTS

### *Languages*

Croatian (Native)  
English (Fluent)  
Italian (Level C1)  
German (Level C1)  
French (Level B1)  
Spanish (Beginner)

Information Technology: C (Beginner)  
AutoCAD (Intermediate)  
ECDL Standard  
MATLAB

Interests: Finance, Arts, Anthropology, Tennis

Volunteering: Preparing and participating at the film festival "Festival of Tolerance" in Zagreb

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## EDUCATION

Bachelor in Business and Administration Athens University of Economics And Business, Greece	10/2011 – 06/2016
Erasmus Programme Berlin School of economics and law, Germany	03/2015 – 07/2015
High School 1st General Senior High School of Kaisariani Athens, Greece	09/2008 – 06/2011

## EXPERIENCES

<b>Trainee, H&amp;R development department</b> Teleperformance Greece – Athens, Greece	03/2016 – 05/2016
<b>Greek Military</b>	09/2016 – 06/2017
<b>Waiter</b>	05/2018 - 09/2018

## PERSONAL SKILLS

### *Languages*

Greek (Native),  
English (Proficient),  
German (B1)

### *Technical*

MS Word  
Excel  
PowerPoint  
SQL

### *Professional*

- Experienced in supervising and instructing others
- Good at keeping records
- Skilful at managing time
- Self-Motivated
- Ability to work under pressure
- Adaptive
- Critical Thinker
- Creative
- Problem Solver
- Good Communicator