**XXXX XX-XXXXXX**
XX Xxxxxx Xxxxxxx, Xxxxxx XXXX XXX
Tel XXXXX XXXXXX   Xxxxx xxxxxxxxxxx@xxxxx.xx.xx

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**PROFESSIONAL PROFILE**

Seasoned professional with twelve years experience in the asset/wealth management industry. Now seeking a marketing / client service / product management role in finance.

**Experience in**: Client Relationship Management, Business Development and Marketing, Research/Analysis, Project and Data Management

**Key strengths**: Articulate with excellent interpersonal and communicative skills. Proactive. Strong team player. Well developed planning and organizational skills. International outlook and experience.

**Other skills**: Conversational French. Basic written and spoken Arabic.

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**PROFESSIONAL EXPERIENCE**

Jan 2009 – Present

Following a relocation back to the UK, have spent the past year planning and managing the renovation of family property, arranging necessary medical care for my father and overseeing his financial and administrative affairs.

Jan 2007 – Dec 2008

Relocated to the US following marriage to a US citizen. During this period, assisted my husband setting up and running his own medical supplies distribution company (Medex)

- Conducted market research into medical supplies industry – analysis of competition, market opportunities, pricing
- Participated in creation of company website
- Provided administrative support managing home office

Dec 2001 – Jun 2006

**THE CAPITAL PARTNERSHIP U.K. LTD** ***London, UK***

*Family office / Investment firm specializing in alternative assets*

*Nov 2003 – Jun 2006* **Senior Associate - Business Development, Marketing and Investor Relations**

- Supported several of the Firm's Partners in developing and managing investor relationships and expanding the firm into new business opportunities and markets
- Responsible for the preparation of all marketing materials – helped to strengthen marketing efforts by greatly enhancing the content and aesthetic quality of marketing materials
- Managed development and on-going editorial control of company website
- Coordinated all activities involved in set up of new client accounts - created comprehensive client database that significantly improved communications with clients and led to greater internal operational efficiencies

*Dec 2001 – Nov 2003* **Associate - Research Group**

- Conducted thorough qualitative and quantitative research and due diligence on hedge funds
- Actively participated in weekly investment strategy team meetings contributing to consensus asset allocation decisions
- Prepared comprehensive client investment performance reports on monthly and quarterly basis, frequently enhancing and streamlining investment reporting process
- Administered clients' private equity investment accounts

Jun 1996 – Jul 2001

**GOLDMAN SACHS ASSET MANAGEMENT (GSAM)** ***London, UK***

**Associate - Compliance Group**

- Monitored investment trading activity and ensured post trade compliance checks were completed and that all errors and breaches were properly documented and reported
- Ensured client accounts were managed in accordance with account guidelines
- Conducted client due diligence and anti-money laundering checks
- Led and delivered project to implement critical and complex investment monitoring system globally across all GSAM offices which significantly increased Compliance monitoring capabilities. (**Involved 3 month secondment to New York head office)**.
- Reviewed and signed off on all marketing and reporting material prior to dispatch to clients

Aug 1994 – Dec 1995 **BANCO DEL GOTTARDO** ***Geneva, Switzerland***

**Analyst - Private Banking Group**

- Assisted senior private bankers in managing investment portfolios for international client base. All workplace communication in French.
- Completed additional training programs in foreign exchange, capital markets and trust/tax planning divisions

Sept 1993 – Jul 1994 **ASCOT PROPERTIES** ***London, UK***

**Residential Lettings Agent**

- Responsible for management of rental properties – drawing up of rental contracts, property maintenance, liaison with other rental agents and clients.

## EDUCATION

Sep 1989 – Jun 1993 **BSc. (Hons) Economics - 2:2**
University College London (London, UK)

Sep 1987 – Jun 1989 **3 A'Levels** – Maths (A), Economics (B), Politics (B)

Sept 1983 – Jun 1987 **8 O'Levels**

## PROFESSIONAL QUALIFICATIONS

Jul 2002 Securities Institute – Certificate in Securities
May 2002 Securities Institute – Regulatory Paper

May 1998 Investment Management Certificate (IMC)