

# Eric Matos de Macedo

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## **Finance & Technology | Specialist in Digital Transformation and Operational Efficiency**

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## **Professional Summary**

Professional with over 20 years of experience in the financial market, with a solid background in Operations, Risk Management, Institutional Service, and Investment Advisory at leading institutions (XP, Clear, Ágora).

Currently in a career transition phase, combining this strong financial foundation (including the management of R\$ 210 million in Assets Under Management - AUM) with an advanced portfolio of Technology and Innovation skills. Seeking to apply this hybrid vision in leadership or specialist roles that require the integration of Finance and Tech to drive Digital Transformation, Process Automation, and Data Analysis in the financial sector.

## **Professional Experience**

### **Partner and Investment Advisor**

#### **SGA Investimentos | Jan 2024 – Present**

- **Asset Management:** Responsible for the management and advisory of a high net-worth client portfolio, totaling over R\$ 210 million in Assets Under Management (AUM).
- **Strategy:** Portfolio structuring and development of personalized investment strategies, leveraging market analysis and technology to optimize returns and risk management.

- Efficiency: Supervision of operational processes and ensuring regulatory compliance across all transactions.

## **Qualified Investor**

**Jan 2019 – Dec 2023**

- Active management of personal wealth, deepening knowledge in asset allocation strategies and market analysis.
- Period dedicated to the intensive acquisition of new technology skills (AI, Full Stack, AWS), building the foundation for the career transition and the application of innovative solutions in Finance.

## **Partner and Operations Manager**

**XP Investimentos | Jul 2017 – Oct 2017**

- Ensured the continuity and efficiency of operations and risk control during the merger process with Clear Corretora.

## **Partner and Manager of Operations and Risk Departments**

**Clear Corretora de Títulos e Valores Mobiliários | May 2012 – Jun 2017**

- Leadership and Risk: Real-time management of all client positions and leverage, ensuring compliance and operational limits for the institution.
- Operational Control: Responsible for supervising and controlling the operational limits of traders (Epuma/GTS) and the brokerage firm, minimizing exposure to risks and operational failures.

## **Operations and Customer Service Manager**

**WinTrade Home Broker | Dec 2005 – Apr 2012**

- Operations: Served as the primary operator on the Trading Desk and later coordinated the Trading Desk for over 6 years.
- Risk Management: Promoted to the Investment Clubs Department and later returned to assume full management of the Wintrade Operations and Risk areas.

## **Customer Service**

**Ágora Senior | Sep 2002 – Dec 2005**

- Served as a Trading Desk Assistant, supporting autonomous agents and acquiring deep knowledge in operational flows (Sinacor, Finance, Custody, and Registration).

## Education and Certifications

### Academic Background

- Business Administration - Uninove - Universidade Nove de Julho ( 2007 – 2011)
- Postgraduate Degree in Digital Transformation and Leadership - Escola Conquer (May 2024 – Oct 2024 )

### Technology Certifications and Courses

- Artificial Intelligence: AI Impressionador, AI Rules, AI Agents with N8N, Growth with AI (Hashtag Treinamentos, Santander, Faculdade Exame)
- Development: Full Stack Impressionador, Python Impressionador, JavaScript Impressionador, HTML & CSS Impressionador (Hashtag Treinamentos)
- Infraestrutura e Dados: Infrastructure & Data: AWS Impressionador, Data Science (Hashtag Treinamentos)
- Security: Basic and Leveling Course of the Hackers do Bem Program Cybersecurity Training (SENAI, Cisco)
- Innovation: Innovation 360 : Transform Ideas into Projects (Faculdade Exame)
- Financial Certification: Investment Advisor (Ancord)

## Languages

- English: Intermediate
- French: In progress