ANDREAS SVOBODA

EMPLOYMENT HISTORY

| since 02.2012 | **Bank Julius Bär & Co. AG**, Switzerland/Singapore |

Head of Wealth Planning (WP) Life & Pension

- Responsibility for four teams (Life Insurance, Pension, Intermediaries Solutions and Competence Centre in the WP department)
- Member of the WP Risk Management Committee, WP Management Committee and Chair of the Offering Committee
- Cost budget and revenue responsibility for Wealth Planning
- Various Project responsibility
- Coordination of the creation of country-specific guidelines
- Development of offering management in Singapore (2012 – 2014)

09.2009 – 03.2011   Liechtenstein Insurance Association, Vaduz

Board Member

- Communication, Marketing, Public relations
- Strategy work, advocacy and financial planning

04.2008 – 03.2011   Wealth Assurance AG, Vaduz/ Schaan

Management Director/ Head of Finance

- Responsible for the management of the insurance company from 2010
- Strategic orientation of the company including risk management
- Management of the Board of Directors meeting, establishment of the insurance company
- Management of accounting and management of the back office (operations, compliance, finance, admin, HR)

07.1999 – 03.2008   UBS AG und UBS Life Switzerland, Liechtenstein, Ireland

Head of Finance of UBS Insurance companies

- Head of Finance 2002 – 2008
- CEO of UBS Global Life AG 2004 - 2008

Business Unit Controller

- Controller Financial Planning, 2001 - 2002
- Controller Logistics, 1999 -2001

10.1998 – 06.1999   Credit Suisse, Rapperswil

Financial advisor

- Relationship manager for affluent clients as well as small and medium companies

04.1991 – 09.1998	Zürcher Kantonalbank, Zurich

Various functions
- ‣ Product manager credit and loans
- ‣ Relationship manager
- ‣ Customer accounting

LECTURING EXPERIENCE

Since 08.2022	Vision Goal LLC. Lachen

Founder
Coaching and educational service

since 08.2022	United International Business Schools, Zurich & Geneva

Professor
- ‣ Accounting
- ‣ Finance
- ‣ Global Banking

since 06.2021	HSO, Zurich, Rapperswil & Baar

Lecturer
- ‣ Accounting
- ‣ Investment
- ‣ EMBA, Business Innovation, Finance and Risk

since 05.2021	THE Insurance Academy, Freienbach

Founder

since 01.2021	Swiss Distance University of Applied Sciences, Zurich (FFHS)

Lecturer
- ‣ Controlling
- ‣ Capital Markets
- ‣ Portfolio Management
- ‣ Sustainable Finance

Head of Department
- ‣ Finance and Leadership, Banking and Finance

EDUCATION

09.2018 – 09.2020	University Zurich

LL.M. UZH International Business Law

03.2018 – 11.2019	University of London

Master of Science Professional Accountancy

08.2010 – 10.2017	University of Liverpool

Doctor of Business Administration

09.2002 – 10.2004	University of Southern Queensland

Master of Business Administration

08.1996 – 10.2000	Hochschule für Wirtschaft Zürich HWZ

Betriebsökonom HWV

FURTHER EDUCATION

01.2021	SVEB 1 Certificate
01.2021	Certified Financial Planner (CFP®)
11.2020	Certificate in Data Analytics: Think Ahead ACCA
10.2021	International Leadership and Organisational Behavior: Coursera Certified Courses
10.2019	Intensive Course in American Law: Tulane University Law School
2019	Team Leader Program 2.0: IMD Business School
06.2018	Finanzplaner mit eidgenössischem Fachausweis: IfFP – Institut für Finanzplanung
05.2018	Issues for the Finance Professional: Coursera Certified Courses (CCC)
03.2018	Investment Management by HEC Paris and AXA Investment Managers: CCC
01.2018	Mastering Data Analysis in Excel by Duke University: CCC
12.2017	Chinese for Beginners: CCC
04.2011 – 01.2012	China Sabbatical: intercultural competences
2008 – 2010	Chartered Certified Accountant (FCCA)

SKILLLS

languages	German, mother tongue
	English, Business fluent
	French, advanced basic knowledge