



## Contact

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### GitHub

<https://github.com/brmoretti>

## Education

2023 - Current

**Software Engineering**

Ecôle 42 - SP (Brazil)



2023 - Current

**Python for Financial Markets**

Trading com Dados (Trading With Data)



2015

**Agricultural Engineer**

UNICAMP - State University of  
Campinas (Brazil)



2012

**Production Engineering (exchange)**

University of Coimbra (Portugal)

## Expertise

- Financial Planning
- Programming
- Data Analytics
- Python

## Languages

Portuguese

English

Italian

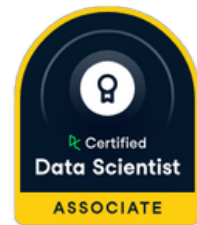
# Bruno Moretti

Financial Planner, CFP®

Engineer

Quantitative Analyst

Software Developer



I am a dedicated and motivated individual with a solid background in finance and a growing passion for programming and data science. Through my experience in financial planning, I have honed my analytical and strategic thinking skills, which I am now combining with my newfound proficiency in programming, acquired through studies at Ecôle 42. This dual expertise uniquely positions me to navigate the intersection of finance and technology, allowing me to provide innovative solutions and insights. Committed to continuous learning, I am enthusiastic about leveraging this hybrid skillset to deliver exceptional results in both financial planning and programming domains.

## Experience

2020 - 2023

Safra Bank | Sao Paulo - SP, Brazil



**Safra**

### Private Banker and Investor UHNWI

As a financial planner specialized in the High and Ultra High segments, I have worked to build and represent the investment strategy vision of the bank. I provided consultative support to clients on market-related issues, with a comprehensive knowledge of private products such as exclusive funds, investment funds, fixed income products, structured products, private equity, and retirement plans. Each of my clients has over **USD 10 million** in assets and the total AUM of these portfolios is above **USD 3 billion**. As a banker, I was part of the first group to enroll in the Safra Top Banker program, where I received training to act as both a farmer and a hunter in the commercial sector.

2016 - 2020

Itaú Bank | Sao Paulo - SP, Brazil



### Senior Analyst of Offshore Investment Team

Reporting to the Miami structure, I worked on developing tools for the mass production of investment recommendation lists, generating hundreds of contacts and thousands of allocation recommendations for the commercial team every month. Additionally, I was the main responsible for developing the monthly communication tool for the performance of consolidated onshore and offshore portfolios.

### Others experiences in Itaú

I was selected to work in Itaú through a highly selective trainee program. I had the opportunity to work in various teams across different areas, including Corporate Security, Internal Controls, Credit Risk, and Market Risk.

During the trainee program I was promoted because of the strong performance and ability to build and maintain positive relationships with partners and clients.

2015-2016

Sao Martinho Sugarmill | Pradopolis - SP, Brazil



### Trainee

I was particularly responsible for agricultural maintenance indicators. I studied finance-related subjects in order to transition my career to the financial market.

## Online courses

- Data Scientist With Python - Career Track (90h) - Datacamp
- Python Programmer - Career Track (59h) - Datacamp
- Financial Markets - Yale University - USA
- Competitive Strategy - Ludwig-Maximilians - Universität München
- Essentials of Corporate Financial Analysis and Decision-Making - University of Melbourne