

# JUAN-BERNARDO RIVERO

## Investment Analyst

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Nationality: Swiss • Mobility: Driver License

## Profile

Results-driven investment analyst with over 10 years of experience across various industries. Expertise in venture capital, private equity, and the startup ecosystem, with a strong focus on financial modeling and investment analysis. Trilingual with solid international experience, adaptable to fast-paced environments.

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## Core Skills

### ★ Transaction Execution

- Conducted due diligence for investment opportunities in real estate markets.
- Coordinated with external advisors to streamline transaction processes.

### ★ Valuation & Modeling

- Developed financial models for investment analysis and market assessments.
- Performed valuations for startups and established companies.

### ★ Dealwork & Coordination

- Managed partnerships and business opportunities in new customer segments.
- Led cross-functional teams to execute strategic initiatives.

### ★ Commercial & Sector

- Identified and assessed potential investment partners in the DACH region.
- Analyzed market trends to inform investment strategies.

### ★ Tools

- Proficient in Excel for financial modeling and analysis.
  - Experienced with CRM tools like HubSpot and project management software.
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## Experience

### **SGR Compliance S.A.** • Business Development Specialist AML / CTF • Lugano • 2022 - 2023

- Designed Go-To-Market strategy for AML/CTF SaaS solutions, enhancing market entry.
- Sponsored international compliance events, boosting brand visibility.

### **And3s LLC** • Project Manager • Florida / Lausanne • 2019 - 2021

- Led development of an online credit platform, achieving over 3,000 registrations in 90 days.
- Implemented Lean Startup Methodology, enhancing project efficiency.

### **Lexios.io** • Co-Founder – Growth • Lausanne • 2021

- Achieved over 500% growth in social media channels, driving user acquisition.
- Participated in Swiss EdTech Collider Startup Incubator, enhancing business strategy.

### **Prime Equity Financial Corporation** • Business Development Manager • Florida • 2019 - 2021

- Trained over 15 loan officers, resulting in a 30% increase in annual sales.
- Led digital transformation projects to diversify lead generation.

### **Swissxer S.A.** • Head of Global Trading Operations and Business Development • Geneva • 2010 - 2017

- Directed global trade flow, achieving a 20% increase in trading margin.
  - Reduced supplier lead time by over 15% through process optimization.
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## Earlier Experience

### Market Analyst • JTI • Lausanne • 2007 - 2008

Collaborated with departments to provide data-driven recommendations for product development and pricing strategies.

Analyst • Merrill Lynch • Florida • 2001 - 2003

Fostered growth in Corporate Finance Division through consultative selling strategies.

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## Education

MBA Financial Valuation and Investment Management • Lynn University • USA • 2020

Executive Ed Entrepreneurship • Harvard Business School • USA • 2014

Business Information Systems • HEC Lausanne • Switzerland • 2006

BBA Management • Lynn University • USA • 2002

High School Diploma • Valley Forge Military Academy • USA • 1997

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## Certifications

- Certified Project Management Associate IPMA® Level D, IPMA 2023
  - IBM Data Science Professional Certificate, IBM 2024
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## Languages

English - Bilingual/Near-native • French - Bilingual/Near-native • Spanish - Bilingual/Near-native • German - Intermediate

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## Technical & Tools

Excel (advanced: financial modeling) • PowerPoint • Python • SQL • HubSpot

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## Affiliations

Swiss EdTech Collider, EPFL Innovation Park • FAU Tech Runway, Florida Atlantic University

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## Volunteering

Committee Member – Innoboard, InnoPark Suisse

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## Interests

Sustainability • Technology • Fitness • Reading