

JUAN-BERNARDO RIVERO

Investment Analyst

Chemin des Tuilières 9, 1028 Préverenges • Phone: 076 690 26 05 • Email: juan.bernardor@proton.me • LinkedIn: [linkedin.com/juanbernardorivero/](https://www.linkedin.com/juanbernardorivero/)
Nationality: Swiss • Mobility: Driver License

Profile

Results-driven investment analyst with over 10 years of experience in financial valuation, modeling, and investment analysis. Proven track record in entrepreneurship and strategic partnership development. Trilingual with solid international experience, adaptable to fast-paced environments.

Core Skills

★ Transaction Execution

- Designed Go-To-Market strategies for financial services
- Conducted market analysis to identify business opportunities

★ Valuation & Modeling

- Developed financial models for strategic analyses
- Performed due diligence for investment opportunities

★ Dealwork & Coordination

- Managed partnerships and business development initiatives
- Coordinated cross-functional teams for project execution

★ Commercial & Sector

- Engaged in strategic outreach to cultivate partnerships
- Analyzed market trends to inform investment strategies

★ Tools

- Proficient in Excel, PowerPoint, Python, and SQL
 - Experienced with CRM/ERP systems like HubSpot and SAP
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Experience

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

- Launched AML/CTF SaaS solutions, enhancing market presence
- Identified new customer segments, driving business growth

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

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

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

- Achieved over 500% growth in social media channels
- Participated in Swiss EdTech Collider Startup Incubator

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

- Trained over 15 loan officers, increasing annual sales by 30%
- Led digital transformation projects for lead generation

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

- Increased trading margin by over 20%
 - Reduced supplier lead time by 15%
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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

Spearheaded growth initiatives for the Corporate Finance Division through consultative selling strategies.

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

Certifications

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

English - Bilingual/Native • French - Bilingual/Native • Spanish - Bilingual/Native

Technical & Tools

Excel (advanced: financial modeling) • PowerPoint • Python (pandas, Matplotlib) • SQL • Bloomberg Terminal

Affiliations

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

Volunteering

Committee Member – Innoboard, InnoPark Suisse

Interests

Sustainability • Technology • Fitness