

JUAN-BERNARDO RIVERO

Investment Analyst

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Nationality: Swiss • Mobility: Driver License

Profile

Results-driven, tech-savvy business professional with over 10 years of experience in investment analysis and entrepreneurship. Expertise in the startup ecosystem, valuation, financial modeling, and due diligence. Proven track record in negotiation, problem-solving, and effective communication in multicultural environments.

Core Skills

★ Transaction Execution

- Executed due diligence for multiple investment projects, enhancing decision-making processes.
- Led sell-side and buy-side transactions, ensuring compliance with financial regulations.

★ Valuation & Modeling

- Developed financial models to assess sustainable revenues and earnings for target companies.
- Conducted comprehensive valuations to support strategic investment decisions.

★ Dealwork & Coordination

- Coordinated cross-functional teams to deliver insights for M&A; transactions.
- Managed stakeholder relationships to facilitate smooth deal execution.

★ Commercial & Sector

- Analyzed market trends to identify growth opportunities in the financial services sector.
- Engaged with clients to understand their needs and tailor solutions accordingly.

★ Tools

- Proficient in Excel for advanced financial analysis and modeling.
 - Utilized CRM tools like HubSpot for managing client relationships effectively.
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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, resulting in successful market entry.
- Identified partnerships leading to new business opportunities in the financial sector.

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 the Swiss EdTech Collider Startup Incubator, enhancing business visibility.

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

- Designed and led training programs for mortgage loan originators, increasing sales by over 30%.
- Managed digital transformation projects to diversify lead generation channels.

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

- Directed global trade operations, achieving a 20% increase in trading margin.
 - Reduced supplier lead time by over 15% through improved operational strategies.
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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 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/Near-native • French - Bilingual/Near-native • Spanish - Bilingual/Near-native • Italian - Intermediate

Technical & Tools

Excel (advanced: financial modeling and analysis) • 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 • Calisthenics • Fitness • Boarding sports