



**PRISCILA MARIA CARBALLIDO MENDES**

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## **PROFILE**

CFP®, Economist & Business Manager.

20y> Financial Markets: Institutional Sales and Wealth Management.

11y~ Entrepreneur in education as founder of Hora da Leitura NGO (pro bono).

Brazilian and Spanish passports.

## **SKILLS**

- Exceeded goals and objectives of client and product sales
- Ability to plan sales and strategies (CRM), manage teams and work alone fine
- Excellent verbal, written communication skills (fluent: Portuguese, English) Spanish (advanced) and training on conflict mediation
- Experienced in training clients' teams and ongoing sales support
- Flexibility in a fast-moving environment, measure oriented and enjoys people
- Currently learning: Internet Systems

## **PROFESSIONAL EXPERIENCE**

**January 2023- current – Institutional Sales of Project Finance, São Paulo.**

**September 2021 to June 2022 – Hashdex Gestora de Recursos Ltda.**

**Institutional Sales, Director. Rio de Janeiro.**

- Sales of Crypto ETFs and Investment Funds to B2B Banks, Fin Tech distribution to B2C, Assets, Family Offices, Pension Funds (EFPC) and Pension CIAs (EAPC);
- Responsible for the business planning and it's implementation.

**September 2020 to present – Empiricus Investimentos, former Vitreo Gestão de Recursos Ltda. Head of Financial Advisors, HNW, São Paulo.**

- Structure, hire, train and supervise a team of financial advisors for HNW clients.
- Responsible for planning and driving the profitable long-term business strategies; Asset Allocation expertise of >500 HNW clients.
- Development of systems planning and reportsa with Tech team.

**August 2019 to August 2020 – GFAI, autonomous Financial Planner for HNW.**

**July 2008 - July 2019 – NGO Instituto Hora da Leitura**

**Founder and CEO, pro bono. Instituto da Criança as a partner.**

Built methodology, fund raising, financials, managed up to 12 professionals. Results: benefited over 9000 kids and teens from low-income families from 3 states; 40.000 books distributed to about 40 public schools and communities.

**November 2017 - December 2018 –Digital Behavior iPlatform, Co-Founder:**

Sales, digital marketing, events and operational strategies.

**March 2000 - March 2016 - Banco BTG Pactual S/A and Asset Management**  
Rio de Janeiro & São Paulo. (former: UBS Pactual & Banco Pactual)  
**2008 to 2016 - Executive Director 2013:** Institutional (Pension) and Financial  
**2006 - 2008 – Director:** Banker of Brazilian Financial Institutions  
**2000 – 2002 - Product Specialist:** Funds structuring (offshore and local Asset)

***Client segmentation: Institutional - Pension Funds (corporate and public), Insurance Companies, Public Endowments (municipalities and state owned), banks (private banking and wholesale segments), asset allocators, brokerage/tec platforms, and family offices.***

The client base coverage of about AUM of US\$ 3.5 billion of assets under management, with about eighty active institutional and financial clients.

**Routine:** Client relationship and prospect banker; provide investors & bankers, Investment Committees education training programs; negotiate contracts, exclusive funds terms; liaison between clients and investment team;

**Products:** varied widely from Mutual Funds, hedge funds, equity funds, Private Equity (Ex. multi-sector, Timber, Infrastructure), Real Estate funds and Global Offshore.

**July 1999 – March 2000**  
**Banco SRL American Express, São Paulo, Brazil**  
**Wealth Management, Global Fund Analyst.**

**May 1996 – June 1999**  
**Banco Modal S/A, Rio de Janeiro, Brazil**  
**Wealth Management, Global Fund Analyst.**

**August 1990 – January 1996**  
**Banco J.P. Morgan S/A, São Paulo, Brazil**  
**Middle Office Associate, Training Program in New York, USA.** International clients middle office. Operations: FX, Fixed Income, Equities and Credit.

## **E D U C A T I O N**

**January 1984 - December 1989**  
**Missouri State University, Springfield, MO, USA**  
**Bachelor of Science: Economics & Business Management**  
**Scholarships** (1986 to 1990): Fulbright academic and sport.  
Award: US Achievement Academy as National Collegiate Award Winner.

**1984 - June 1986- PUC: Economics, Rio de Janeiro, Brazil.**

## **Courses**

*Current: FIAP: Internet Systems (current) ; FKPartners: CGA (current)*  
Pomp Crypto Course, Credit Analysis, Valuation & Financial Models, Planning and Cost, Basic Theoretical Conflict Negotiation, Digital Marketing, Financial Planning Association Seminar (USA).