



PRISCILA MARIA CARBALLIDO MENDES

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PROFILE

CFP®, Economist & Business Manager.

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

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

Brazilian and Spanish passports.

SKILLS

- Exceeded goals and objectives of clients and financial products 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 conflict mediation training
- 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

February 2023, current – Institutional Sales of Project Finance

Photovoltaic Plants, distributed generation (“GD”)

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

Institutional Sales, Director.

- 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 its implementation.

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

- 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 reports with Tech team.

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

March 2000 - March 2016 - Banco BTG Pactual S/A and Asset Management (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 done: 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

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

Middle Office Associate, Training Program in New York, USA. International client's - middle office. Operations: FX, Fixed Income, Equities and Credit.

E D U C A T I O N

February 2023, current

FIAP – Faculdade de Informática e Administração Paulista

Internet Systems: Web, data science, cloud computing, mobile and business development

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

Pomp Crypto Course, Credit Analysis, Valuation & Financial Models, Planning and Cost, Basic Theoretical Conflict Negotiation, Digital Marketing, Financial Planning Association Seminar (USA).

P R O B O N O

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.