**Pessoas posando para foto

Descrição gerada automaticamente**

**PRISCILA** MARIA CARBALLIDO **MENDES**

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**P R O F I L E**

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.

***S K I L L S***

• 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

**P R O F E S S I O N A L E X P E R I E N C E**

**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 its 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 reports with Tech team.

**August 2019 to August 2020 – GFAI,** autonomousFinancial 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, Sāo 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).