Australian in Singapore (PEP holder) +65 8264 0955 cameronpoulton@gmail.com <http://www.linkedin.com/in/cameronpoulton>

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| **Profile** | 1. A business manager with 17 years of operational and change management experience in top tier global organisations 2. A Big Four qualified accountant who delivers control, cost and quality improvements 3. A diligent and committed leader who motivates teams through collaboration, communication and negotiation | |
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| June 2013 – June 2016 | BLACKROCK investment management london  Head of Financial Planning & Analysis – EMEA Institutional, Director   1. CFO / Finance Director for client business of $1b revenues, guiding and informing senior stakeholders to achieve better commercial and strategic outcomes  * Led team of ten in budgeting, forecasting and reporting performance across core metrics of AUM, cashflows, revenues, expenses, headcount and productivity * Prepared business reviews and modelled initiatives for management eg. distributor pricing, resource allocation * Member of Operating Committee and represented Finance in product development and working groups * Covered spectrum of product for pensions, insurers, sovereign wealth funds and retail clients – alternatives (hedge funds, private equity, real estate), fixed income, equities, multi-asset, solutions, active, passive  1. Project manager for the delivery of improvements to MIS processes and systems  * Measured sales performance through new metrics, enhanced CRM data, launched new products * Designed and productionised sales dashboards – by country, key funds, top clients, client service/segments  1. Hired and onboarded new joiners, managed and cross-trained staff in the UK, India and Hong Kong | |
| June 2010 – April 2013 | UBS INVESTMENT bank london  Business Manager / COO – Equities Sales & Trading, Director   1. Drove strategy to enhance revenue growth across regions and product lines  * Built, monitored and adapted global and regional operating plans and budgets eg. product, sales, headcount * Drove product development and risk reduction through IT agenda to completion eg. trade capture, MIS * Pursued cost and headcount efficiencies eg. funding, JVs, market data vendor selection * Prepared and presented management presentations eg. quarterly reviews, product deep dives, tax policy * Developed marketing materials eg. intranet pages, computer based training, global stamp duties  1. Set up a robust business front office control environment for new and existing business to ensure accountability  * Hosted and participated in committees and working groups eg. operating, IT steering, onsites, legal pipeline * Reviewed metrics of financial performance, operational risk and client profitability/RoA/RWA * Led regulatory response for Equities eg. Dodd Frank, Volcker, FTT, dividend taxes * Assessed, tracked and resolved open internal and external audit items eg. trader product mandates * Maintained financial architecture, supervisory structures, business continuity plans and approvals * Built strong relationships with Operations, Finance, IT, Compliance and Legal; directly managed three staff * Products managed – delta one equity swaps on single stocks / baskets / indices, ETFs, stock borrow loan |

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| Sept 2007 – June 2010 | CREDIT SUISSE INVESTMENT BANK london  **Product Control – Prime Services & Fund-Linked Products, Vice President**   1. Managed team of ten staff in daily P&L, inventory valuation and month end production tasks  * Coached, motivated and empowered staff to maximise contributions, professional growth and team * Responsible for quality of work, client relations, resource and cost management * Ensured team complied with policies, met deadlines and applied professional skepticism at all times * Products controlled – prime brokerage, stock borrow, listed derivatives, delta one/ leveraged notes  1. Improved performance through business partnering and value-added management information  * Coordinated and implemented new business eg. South African equities and Australian prime brokerage * Improved speed and quality of reporting eg. balance sheet, liquidity, client profitability, forecasting, budgeting, trend analysis, trader metrics * Escalated system deficiencies, outstanding breaks, data quality issues and issues not well understood * Prepared business cases and project plans, gained sponsorship and prioritisation eg. new P&L tools  1. Delivered strategic change projects that improved controls and reduced costs and operational risk  * Led working groups that re-engineered architecture, practices, standards and capabilities eg. client cash * Led problem solving and implementation efforts eg. price testing collateral, remediating data feeds * Adapted to new tax, regulatory, accounting and legal entity requirements eg. fair value, SOX, audit |

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| Oct 2006 – Aug 2007 | DEUTSCHE bank london  Product Control – Credit, Consultant   1. Reviewed new deals, reported P&L to traders, attributed risk, arranged trade re-bookings 2. Investigated and resolved Special Purpose Entity aged settlement breaks 3. Reconciled balance sheet reserves to trader estimates 4. Documented procedures and trained new recruits, supervised three staff 5. Products controlled – convertible bonds, bonds, bond options, swaps (interest rate/asset/currency/credit default) |
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| Sept 2002 – July 2006 | ubs investment bank london & NEW York  Product Control – Equities, Associate Director   1. Led projects and analysis to support aggressive business growth with effective control  * Launched dividend-enhancement hedge fund domiciled in Cayman Islands – set up risk infrastructure, authored Operations booking model, and achieved favourable external audit opinion * Launched convertible arbitrage hedge fund and ETF gold trading business * Investigated and analysed aged settlement breaks of $10m for swaps business  1. Provided strategic thinking to ensure integrity of front-to-back change  * Enhanced processes and controlled costs eg. specification of new systems, ledger reports and databases * Identified and championed improvements in static data quality eg. swap settlement  1. Satisfied extensive regulatory requirements  * Oversaw operational risk reduction – fewer prior period adjustments and amounts at risk * Liaised with auditors – received zero audit points * Complied with external and internal reporting standards eg. IAS39 and inter-company reconciliations * Reviewed and approved business unit balance sheets for completeness, classification and recoverability * Reviewed internal controls and collected evidence that policies and procedures were applied effectively  1. Provided value-added decision support and management information  * Produced P&L by client and analysed balances and spreads * Collaborated with Management, Traders, Operations, IT, Tax, Compliance, Legal, Reporting and Risk  1. Recruited, managed and trained team of four staff  * Prepared, analysed and reported daily P&L and commentary * Reconciled front office bookings to ensure agreement with actual cash flows * Validated risk management system derivations of replacement values and inventory marks * Reserved where appropriate according to Day One P&L recognition principles * Products controlled – prime brokerage, stock borrow, OTC and listed derivatives, CBs and cash |
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| 1997 – 1999 | kpmg sydney  Middle Market Advisory, Accountant   1. Prepared financial statements, tax returns, compliance and management reports for mid-sized companies in finance, real estate and professional services 2. Planned and completed audits of pension funds, investment trusts and manufacturing companies 3. Developed solutions to improve client processes and implemented new accounting systems |
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| **Education** |  |
| 2001 – 2002 | cpa australia **CPA Program**  Professional accountancy qualification – awarded with Distinction, now a Fellow |
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| 2001 – 2002 | FINANCIAL SERVICES INSTITUTE OF AUSTRALASIA G**raduate Diploma of Applied Finance**  Investment Analysis major – awarded with Credit |
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| 1997 – 2000 | UNIVERSITY OF WOLLONGONG, australia B**achelor of Commerce**  Accountancy major – awarded with Merit (Top 5%), first place in Tax Law |
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