

GIULIO MOSTRATISI

Via Salvo D'Acquisto 53, Domodossola, Verbano Cusio Ossola, Italy
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Born in Domodossola, Italy on 12 April 1996

EDUCATION

AIPB Italian Private Banking Association

Master in Private Banking and Wealth Management

Milan, Italy

Apr 2021 – Jul 2021

Final dissertation: “The Generational Change through the Wealth Way Tool. New Needs and New Service Models”

Relevant Coursework:

- Financial Portfolios Optimization; Investment Certificates; Generational Handover and Asset Segregation Tools
- Private Market (PE, VC, Private Debt, SPAC, Crowdfunding, Eltif, Club Deal, Mini-Bond)

Pavia University

MSc in Economics, Finance and International Integration (Curriculum Finance)

Pavia, Italy

Sep 2018 – Nov 2020

GPA: 28.323/30 | Graduation Grade: 110/110

Final dissertation: “COVID-19’s Impact on Economy and Financial Markets”

Relevant Coursework:

- Economics and Finance of Multinational Corporations; Applied Quantitative Macroeconomics
- Probability and Stochastic processes; Data science; Financial Econometrics; Bank management

University College West

Erasmus + Exchange Program

Trollhättan, Västra Götaland, Sweden

Jan 2019 – Jun 2019

Relevant Coursework:

- Financial Institutions and Risk management; Economic and Financial research methods
- Financial Economics and International Economics

Pavia University

BSc in Business Administration and Corporate Finance

Pavia, Italy

Sep 2015 – Oct 2018

GPA: 27/30 | Graduation Grade: 106/110

Final dissertation: “Curricular Internship at Bellini Forlenza Ltd”

Relevant Coursework:

- Financial Mathematics; Corporate Finance
- Accounting and Business Valuation; Corporate Financial Instruments

PROFESSIONAL EXPERIENCE

UBS Europe SE

Full Time - Wealth Management

Milan, Italy

Jul 2021 – Present

- UBS Fiduciaria S.p.A.
 - Mandate management at the Front Office Team (client manager) of UBS Fiduciaria S.p.A.
- Desk HNWI West Lombardy
 - Management of financial portfolios, client on-boarding (Due Diligence and AML control). Monitored the asset allocation of customers, taking part in the purchase and sale of financial instruments (single stocks, bond, first subscriptions of investment funds and subscriptions of structured products)
- Desk Affluent
 - Management of the client accounts. Collaborated with the Client Advisors (CA) in daily operations to better serve the needs and requirements of customers

Umbrella Advisors

Associate Intern – Investment Banking Analyst (M&A Intern)

Tel Aviv, Israel

Oct 2020 – Mar 2021

- Conducted research on prospective firms and prepared customized presentations to use in negotiation meetings (pitch books, investment teasers). Taken initiative to identify prospective mergers and acquisitions, gathered information through multiple channels
- Corporate valuations to determine purchase price for the target company (most significant deal: sell-side M&A of Israeli insurance agency). Assisted in execution of deals by drafting Confidential Information Memorandums for financing and Management reports

Studio Quadra S.A.S

Associate Intern – Financial Advisory

Domodossola, Verbano Cusio Ossola, Italy

Nov 2019 – Sep 2020

- Deepening the dynamics of financial markets with an increase in knowledge of financial instruments and financial institutions in order to propose and recommend the best asset allocation to the customer. Expanded experience regarding the customer relationship
- Cooperated on a project on “Asset Allocation” and “Investment Portfolio Management”. Concrete experience regarding asset allocation

Bellini Forlenza Ltd

Associate Intern – Accounting

Domodossola, Verbano Cusio Ossola, Italy

Oct 2017 – Apr 2018

- Balance sheet analysis at the Ordinary Accounting office (starting from the Petty Cash Book); Value Added Tax (VAT) calculation about invoices to be registered and about reverse charge regime, considering Super Iper depreciation and amortization
- Tax statement, learning to calculate the typical Italian taxes (IRAP, IRES); Cooperated in the analysis of a real board of directors report

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SKILLS, ACTIVITIES & INTERESTS

Languages: Italian (Native), English (Business Fluent, (B2)), French (Conversational), Spanish (Conversational).

Technical Skills: Microsoft Office tools (Excel user), R-Software user, Experienced in SPSS, Matlab Software.

Activities: Attended meetings on the situation of the Economy and Financial Markets (UBS Road Show, Pimco, Aberdeen Standard Investments).

Interests: Football player at a competitive level for 10 years, Formula 1 fan since childhood. Economics and politics enthusiastic.