

DANIELA MOSER



STRENGTHS

- Master Degree in Economics, University of Zurich
- More than 10 years of experience in financial markets
- Wide knowledge and experience in business management, executive support, finance as well as client facing positions
- Very independent and structured approach to work
- Inside out knowledge of the P&L with a flair for numbers
- Strong 'can do' attitude and very solution oriented
- Analytical and conceptual skills
- Team oriented and good communication skills
- Used to work with a heavy workload

moserdaniela@hotmail.com



+41 (0)78 633 30 81



Rütistrasse 41, 8134 Adliswil



From the beginning I was fascinated from the fast growing city of Dubai and all the opportunities and the variety this city offers. Now my husband is starting a new business in Dubai and I would like to take the chance to move back again to one of my favored cities.

PROFESSIONAL CAREER

SINCE 2015

CREDIT SUISSE AG, ZURICH

03/2017 – 06/2021

COO OFFICE BA AFRICA & NRI / VICE PRESIDENT

- Supporting BA Head and COO of BA Africa & Non-Resident India with defining and executing the strategy of the region (e.g. focus on Sub Saharan Africa) and with achieving the financial targets (reached double digit growth), including the financial planning and monitoring
 - Preparing strategic papers and presentations
 - Forecasting and tracking deals to support Head of BA in steering the business
 - Budget allocation to reach yearly targets and coordination of financial restatements
 - Preparing monthly financial reports until CIF level
- Quarterly performance review with Market Area Heads
- Driving and supporting strategic initiatives of the BA, incl. Market Management, Client Segmentation and sales initiatives (reopened several African countries with FINMA, coordination of market exception approvals, ensure market purity)
- Providing support to the RMs with various complex transactions (e.g. share back lending, FCNR, restructurings)

Major Achievements

- Instrumental role in successful transformation of the Market Area Africa & NRI into a Business Area (e.g. setting up new organizational structure and new financial reporting, organized and took over new BA COO tasks and responsibilities, representing new BA in various committees)
- Successful team work in multimillion cross-divisional UHNW transactions where I took the lead for billions of NNA and several millions of revenue recognition
- Leadership of the account opening council which improved the account opening process significantly what lead to a much faster account opening process (improvement of client satisfaction and faster account funding)
- Full leadership of the successful implemented IPC strategy (coordination with project team, RMs and IPC, transfer of 300m AuM to the new created segment)

09/2015 – 03/2017

CLIENT MANAGER UHNWI MIDDLE EAST

- Handling complex account openings for offshore clients (e.g. operating companies, trusts, foundations)
- Delivering services to RMs and clients from the UHNW Individuals service and product offering of CS AG
- Taking the lead for complex project and transaction in coordination with the coverage teams of UHNWI clients (e.g. managed to close several share back lending transactions with several hundred million NNA and millions of revenues)
- Placing orders directly received from clients for securities as well as money market products and taking responsibility for daily cash management

Major Achievements

- Done the account opening and coordination on IWM side for a very complex 1bn NNA restructuring transaction with more than 15 different accounts including the various liabilities between clients
- Prepared several successful approved sensitive Reputational Risk Reviews (RRRP) including one that needed approval from MxB

2014 – 2015

CREDIT SUISSE AG, DUBAI

10/2014 – 09/2015

BUSINESS MANAGEMENT & EXECUTIVE SUPPORT BA MIDDLE EAST, NRI, TURKEY & AFRICA

- Business Management for the whole MENA Region for Investment Banking, Private Banking and Asset Management
 - Preparing financial and strategic reports on markets, teams and RM levels for performance reviews and to identify weaknesses and improvement potential
 - Support RMs on complex transactions and correct NNA and revenues recognition
 - Monitoring and analysis of business drivers and relevant financial indicators
- Executive Support for Market Area Head Middle East/MENA CEO
 - Preparing strategic papers and presentations (e.g. town halls, documents for visits of the Group CEO or Divisional CEO)
 - Prepare financial forecasts and track deals in pipeline for BA Head in order to steer the business for PB, AM and IB
 - Prepare performance reports/scorecards and participate on quarterly performance reviews with PB Market Area Heads and MEA Asset Management and IB together with BA Head

2010 - 2014

CREDIT SUISSE AG, ZURICH

05/2011 – 10/2014

BUSINESS MANAGEMENT & EXECUTIVE SUPPORT MA MIDDLE EAST, NRI, TURKEY & AFRICA

- Executive Support for Market Area Management
 - Business analysis: conducting measurement and analysis of the performance of markets, teams and RMs to identify weaknesses and improvement potential (e.g. created new reports like Dimensioning Analysis to measure performance of teams on different dimensions)
 - Preparing management presentations for Market Head and COO e.g. for Town Halls, quarterly Management Meetings
 - Business reports, e.g. preparing Business Summary for 1:1 meetings between the Market Head and Divisional Head, preparing NNA and revenue forecast, track RM Business cases
- Business Management for Market Area Middle East
 - Prepare weekly NNA reports for Divisional and Market Head including background information of NNA and clients
 - Tracking deals in pipeline
 - Controlling tasks: understanding financial and business KPIs and knowing the main drivers, performing manual bookings, performance restatements
- Front Office Support with main focus on UHNWI and HNWI Segment
 - Acting as entry point for all daily business-related requests
 - Supporting management and RMs for correct NNA and revenues as well as One Bank Deals recognitions

06/2010 – 10/2010

PROJECT MANAGER WEB DEVELOPMENT (TEMPORARY ASSIGNMENT)

- Development of business concepts, structured guidelines and definition of processes in different social media projects
- Definition of the information architecture as well as creation of different documents as “How to do”, processes, guidelines or communication concepts for the bank wide Wikipedia project
- Analysing internet and intranet benchmarking reports and creation of appropriate management summaries and recommended procedures

2002 – 2004

PRFACT AG, ZURICH

06/2008 – 08/2009

JUNIOR COSULTANT

- Conception, design and implementation of marketing- and PR-concepts as well as event

INTERNSHIP AND WORK EXPERIENCE DURING STUDIES

11/2007 – 03/2008

INTERNSHIP AS ANALYST AT DIGMA MANAGEMENT COLSULTING, ZURICH

- Collaboration and support in current projects in performance management, strategy development and implementation and sustainable performance improvement

03/2007 – 10/2007

EXECUTIVE ASSISTANT AT FETSCHERING PUBLIC & INVESTOR RELATIONS, MEILEN

- Organization and implementation of press conferences and client activities, mainly road shows for companies that are looking for capital in Switzerland

05/2002 – 11/2003

EXECUTIVE ASSISTANT AT NOBLE INVESTMENTS SA, ZURICH

- Coordination of various office management tasks incl. Reception

STUDIES & EDUCATION**SINCE 2010**

Various courses: Mentoring Advisory Group (MAG) for Female Junior Talents, Awareness of Compliance Red Flags, CDB 16 Training, Conducting Effective Conversations, Conducting and Facilitating Meetings, Resolving Conflicts, Future Manager Program

12/2016

Certified Wealth Management Advisor CWMA by SAQ

10/2001 – 02/2007

Studies of economics at University of Zurich Field of Study: Management and Economics
Major: Marketing and Finance
Final Degree: lic. oec. publ. (Master of Arts UZH)
Diploma Thesis: ‚Euphoria by Web 2.0 – Chances und Risks for Businesses‘ (Grade 5)

03/2001 – 10/2001

Various courses University of California Santa Barbara

08/1996 – 01/2001

Matura Typ E (Economics), Kantonsschule Hottingen, Zurich

LEADERSHIP EXPERIENCE**> 03 YEARS**

Line Manager and Coaching

Credit Suisse AG

LANGUAGE SKILLS**GERMAN**

Mother tongue

ENGLISH

Fluent

FRENCH

Basic conversational level

PERSONAL DATA**DATE OF BIRTH**

29. April 1981

NATIONALITY

Swiss