

ANDREAS MICHALIAS

WEALTH MANAGEMENT & BUSINESS DEVELOPMENT EXPERT



+357 99 374 417



michalias@hotmail.com



www.andreasmichalias.net

SUMMARY

Business Development and Corporate Strategy expert with extensive expertise in the Wealth Management industry in Cyprus. High adaptability with tenures in developing new business with substantial growth results and profitability. Builds relationships and maintains existing partnerships across a diverse cultural and industry spectrum. Passionate about client interaction and sales team professional growth with a continued development mindset. Thrives on utilizing available networks, delivering value all the way, quality of work, fast-paced environments, collaboration, and delivering exceptional results while challenging the boundaries of the possible.

EXPERIENCE

EXECUTIVE DIRECTOR

HEAD OF BUSINESS DEVELOPMENT & CAPITAL MARKETS

7Q FINANCIAL SERVICES LTD

2016 - 07/2022

Introduced Business: €35M | 40% Total Revenue to Value | 10 Industries | Team of 11

- Coordinate the strategic business development, framework, and implementation of sales campaigns and initiatives
- Responsible for driving awareness of key sales initiatives and money-in-motion opportunities within sales ecosystem
- Continual collaboration with internal partners to provide key resources to sales team
- Manage and lead relationships with key partners across the firm to help aid broader sales efforts and lock in key accounts
- Support sales initiatives by building out a calendar of coordinated events with Marketing, Product, Strategic Accounts, and Sales teams
- Quantify the impact of various sales initiatives through various metrics
- Mentor, Coach and Train Sales Teams for faster and better results
- **Client Industries: Food Industry | Payment Systems | Banking Sector | Non Financial Corporations | Insurance | Real Estate | Medical | Audit Firms | Refinery | Education | High Net Worth Individuals**

SENIOR CUSTOMER RELATIONSHIP OFFICER FOR SMES

BANK OF CYPRUS PUBLIC COMPANY LTD

2013 - 2016

Portfolio Under Management €50M

- Analysing the Financial Statements of clients, to determine the amount of risk involved in providing new or restructuring existing credit facilities
- Generating revenue from existing clients and developing new relationships
- Monitoring existing facilities and deal with day-to-day customer requests

HONOURABLE ADVISORY ROLES

- Member of the BoD of the Cyprus Stock exchange
- Secretary of the Funds Committee of the Institute of Certified Accountants of Cyprus
- Chairman of the Risk Committee of the Cyprus Stock exchange

PROFESSIONAL VISION

- Tactical Market Penetration
- Utilization of existing resources to expand product reach
- Profitability maximization
- Continuous Team training & Coaching to beat market performance
- Continuous network growth
- Network reinforcement
- Methodical needs recognition
- Continuous product enhancement
- Risk Management

AREAS OF EXPERTISE

- Tactical Business Development
- Risk Management
- Financial Modelling
- Rational Decision Making
- Reporting Skills
- Training - Technical / Theory
- Deadline centered prioritization
- Quantitative Expertise
- Portfolio construction
- Financial Statement Analysis

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DISCRETIONARY FUND MANAGER

2008 - 2013

LAIKI FINANCIAL SERVICES LTD

- Laiki FS: Dealt with wider range of clientele – Pension Funds, Provident Funds, Insurance Funds (**Assets Under Management €100M**)
- Designed and implemented more demanding investment portfolios (in terms of monitoring and adjustments needed)
- Investment vehicles used: Equities, Fixed Income Securities, Structured Products, Mutual Funds, Exchange Traded Funds (ETFs) and Hedge Funds
- Client relationship management and expectation management

DISCRETIONARY FUND MANAGER

2001 - 2008

HELLENIC BANK INVESTMENTS LTD

- Hellenic Bank: Design risk and return portfolio strategies based on client risk profile and implementation (**Assets Under Management €60M**)
- **Preparation and presentation of Investment Policy Statements to clients, including Provident Funds, Pension Funds, Insurance Funds and High Net Worth individuals based on their risk and return objectives.**

INVESTMENT ADVISORY / RESEARCH ANALYST

AAA UNITED STOCKBROKERS LTD

Share Link Financial Services Ltd

PROFESSIONAL QUALIFICATIONS

- Advanced License Certificate from Cyprus Securities and Exchange Commission
- Anti-Money Laundering Certificate from Cyprus Securities and Exchange Commission
- Registered Mediator in Financial Disputes
- Licensed Stock Broker for the Cyprus and Athens Stock Exchange
- Professional Diploma in Banking Operations of American Bankers Association (ABA/AIB)
- Associate Chartered Certified Accountant (ACCA)
- Candidate for Membership of the CFA Institute (Level3)

PROFESSIONAL MEMBERSHIPS

- Professional Member of the Association of Chartered Certified Accountants (ACCA)
- Professional Member of the Institute of Certified Accountants of Cyprus
- Affiliate Member of the Institute of Internal Auditors (IIA)
- Affiliate Member of the CFA Institute

ACADEMIC BACKGROUND

UNIVERSITY OF READING- ICMA CENTRE | UK

MSc International Securities Investment and Banking

UNIVERSITY OF EAST ANGLIA | UK

BSc (Honours) Business, Finance and Economics

SKILLS

Technical Negotiations
Commercial awareness
Reporting to top level management
Integrity
Conflict & Problem Resolution
Organization
Teamwork
Excellent communication
Persuasion

LANGUAGES & TECHNOLOGY

Greek: Native

English: C1

Microsoft Office Applications

Word | Excel | Power Point

ACADEMIC & SPORTS ROLES

Lecturer in Finance

University of Nicosia

Locations: Cyprus, Russia, Ukraine

Key Clients:

University of Nicosia, Bank of

Cyprus, Marfin Laiki Bank,

Renaissance Capital, Gazprom

Audience: Financial Institutions

Employees, Supervisors.

Topic: Certification of Professional

Competence in Banking and

Investment Firms

Licensed Basketball Referee

Cyprus Basketball Association



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