

Safak EREN



Well qualified and results oriented banking professional with over 20 years of successful experience in positions of increasing responsibility and duties. High-profile negotiator with ability to achieve positive outcomes that benefit the company and contribute to ongoing client relationships. Top-performer with track record of consistently meeting or exceeding sales goals and customer expectations. Skilled at education of customers on banking products and recommending best options that meet their short-term and long-term needs. Known for leading with an optimistic, can-do attitude.

Highlights

- Private Banking
- 20+ years of experience in financial services
- Investment Banking/Brokerage
- Excellent Market Knowledge
- Strong mathematical aptitude
- Sharp problem solver
- People focused
- Negotiations expert
- Accurate forecasting
- Team building

Professional Experience

Marbling Financial Group AG, Zurich-CH (06.2018 –)

MD, Head of Client Management

- In charge of managing a private client portfolio with a focus on Turkey, Russia, Europe market.
- Responsible for developing and maintaining new relationships in the region with high and ultra-high net worth individuals, travelling to the region is a requirement.
- Providing advice to clients on asset allocation, portfolio management, and investment management
- Liaise with investment advisory, compliance and execution teams
- Managing client needs and expectations, providing tailor-made solutions
- Role report directly to the Chief Executive Officer

MEPA Group AG, Sarnen/Wilen-CH (06.2017 – 03.2018)

Partner & General Manager

- Responsibility for managing both the revenue and cost elements of a company's income statement, known as profit & loss (P&L) responsibility.
- Responsible for effective planning, delegating, coordinating, staffing, organizing, and decision making to attain desirable profit-making results for the organization.
- Supporting the company Shareholders with organizational, operational and strategic topics

MEPA Otomotiv A.S., Istanbul-Turkey (05.2016 – 06.2017)

Global Operations & Strategies Manager

- Management of relationships through close collaboration with the senior managers of the respective business areas as well as with related corporate functions.
- Acted as a single point of entry for entrepreneurs and executives
- Escalation, mitigation and monitoring risk-related issues to ensure an environment of continuously improving operational risk management and mitigation.
- Following markets, trends, competition and understanding the MEPA Otomotiv A.S. offering of available products, services and structures and making recommendations within the rules & regulations required by the Company and the industry

KESUKA GmbH, Zurich (09.2016 –)

Co-Founder & Head Strategies & Business Development

- Prospecting new Institutional & Private clients, mainly from Switzerland & Europe market
- Active production and design on E-Bikes for KESUKA Brand
- Creation, deployment and management of a local sales strategy aligned to the overall Kesuka's Global Business Plan
- Maintenance of sales tools, processes and methodologies (sales business plan)
- Quality-control

Societe Generale Private Banking S.A., Zurich (09.2014 – 12.2015)

Relationship Manager Entrepreneurs and Executives

- Prospecting new clients, mainly from the Turkish market, through existing and new contacts
- Acted as a single point of entry for entrepreneurs and executives
- Development and establishment of all client relations and segments
- Following markets, trends, competition and understanding the Bank's offering of available products, services and structures and making recommendations within the rules & regulations required by the Bank and the industry
- With strong Capital markets knowledge and a continuous market evaluation in order to be able to propose best suitable products and also to make use of primary market advantages in favor of our client

Bank Julius Baer & Co. Ltd., Zurich (06.2013 – 09.2014)

Director

- Promoted to be Director with the same job description after merger agreement of Merrill Lynch Suisse S.A. to Bank Julius Baer & Co. Ltd.

Merrill Lynch Bank (Suisse) S.A., Zurich (06.2011 – 06.2013)

Financial Advisor, Vice President

- Prospecting new clients, mainly from the Turkish market
- Acted as a single point of entry for entrepreneurs and executives
- Servicing and retaining current client base
- Following markets, trends, competition and understanding the Bank's offering of available products, services and structures and making recommendations within the rules & regulations required by the Bank and the industry
- Counselling clients, both from a relationship management and investment strategies perspective in collaboration with Banking Product & Service Specialists as well Merrill Lynch research tools
- Managing risk in the Merrill Lynch Bank (Suisse) S.A. framework and working in close partnership with management

Swiss PB AG, Zurich (04.2009 – 05.2011)

Head of Equity & Derivatives Desk

- Grow a new and an existing client base (financial intermediaries, corporate and private clients) through a highly consultative sales approach in close collaboration with the team members
- Development and establishment of all client relation and segments
- Identifying new opportunities and implementing new technologies, promoting Swiss PB's technology, products and services to clients with a primary focus on Swiss PB core capabilities in Global Cash Equity
- Controlling of the Leads-, Client Applications- and AML forms of the front activities, customers' limits for the electronic dealing (straight through process)
- Responsibility for the implementation and monitoring of the risks of the nostro limits provided by the treasury department
- Executing of the client orders through AVTS for voice traded products
- Managing client accounts through e-Portfolio for risk management
- Marketing and sales activities of the Global Cash Equity products
- Establishment of the desk budgets

Dinosaur GmbH, Thalwil-Zurich (04.2006 – 04.2009)

General Manager

- Running all projects from introduction to completion including all business costing and final profit analysis
- Setting the marketing strategy for the region (Switzerland, Turkey and Middle East) as well as providing input to the company's global strategic options, direction and competitive stance development
- Directing, managing and developing the strategic and operational functions in order to maximize awareness of institutional investors within defined geographic and vertical markets to products and services offered by various foreign brokers
- Introducing institutional investors to Global Futures and Options, Stocks and Options and Foreign Exchange trading platforms run by various foreign brokers
- Searching for institutional companies interested to invest in foreign markets
- Developing business relations, introducing institutional investors to various brokers abroad

Index (Switzerland) AG, Zurich (03.1999 – 04.2006)

Head of Securities

- Responsible for all business workflow in the company
- Controlling and developing stock desk activities
- Developing marketing field of the company to Turkish and Middle East institutional Companies.
- Execution American and European Stocks and Stock Options & Futures
- Being responsible in controlling all statements
- Checking market analysis for effective information distribution
- Index (Switzerland) AG called between 01.2002 and 09.2005 as Refco (Switzerland) AG (worked as Head of Equities Desk), between 11.1999 and 01.2002 as LFG Futures (Europe) AG (worked as Account Executive), until 11.1999 as ED&F Man International AG (worked as Junior Broker)

CROS AG, Taegerwilen (03.1997 – 03.1999)

Trader

- Trading and Executing American Futures and Options, Stocks and Options, Eurex Futures and Options
- Controlling daily brokers statements
- Market analysis, Trade booking and Back Office

Education

1996 Yildiz Technical University, Bachelor of Science in Chemical Engineering, Istanbul (TR)

1989 Besiktas Ataturk High School, Istanbul (TR)

Languages

German	Fluent
English	Fluent
Turkish	Native Language