

Jean-François Laurent

Ranked Among Europe's Top 10 Fund Selectors by the Financial Times

Investment Advisor to One of the World's Richest Families

Internationally Recognized Authority on Manager Selection and Assessment of Fund Managers

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Chief Investment Officer

Private Banking • Multinational Asset Management • Portfolio Management • Sovereign Funds

Accomplished Financial Executive, Fund Selector, and Investment Strategist who consistently succeeds despite impossible market conditions. Longstanding reputation for sound business judgment and fair dealing. Fluent French and English. Competent German.

- Set up infrastructure that drove equities and fixed income into the top 10% of comparable firms (DIFA).
- Steadily grew total multi-asset portfolios and funds to more than \$20bn over 6 years (SSG).
- Led team that invented a highly successful strategic-asset allocation methodology (AKB).
- Worldwide network of trusted financial colleagues, including the top leadership of leading firms such as Blackrock, Aberdeen, GMO, and many others. Frequently quoted in the business and investment media.

Investment Strategy
Risk Budgets
Asset Category Valuation

Equities & Fixed Income
Return Hurdle Rates
Risk Parity Approaches

Hedge Funds
Portfolio Stress Tests
Absolute Return Fund

PROFESSIONAL EXPERIENCE

DUBAI INVESTMENT FUND ASSOCIATES, Abu Dhabi, 2008–Present

Sovereign Wealth Fund and Investment unit of the Government of Abu Dhabi.

Chief Investment Officer for Equities and Fixed Income (EFI)

- **Business Challenges:** Brought on board to build an entire EFI management infrastructure for ADIC, which was established in 2007.
- **Actions and Results:**
 - Assessed the landscape, challenges, and opportunities. Starting from a blank page, built a new organization from the ground up.
 - Recruited and led a large, diverse group of internal professionals, seasoned industry experts, consultants, and service providers.
 - Leveraged team's expertise in asset allocation, manager research, and portfolio management. Generated investment themes, conducted manager searches, performed due diligence, and made investment decisions.

DIFA – HIGHLIGHTS OF SUCCESSFUL STARTUP

- Ranked in the upper 10% of comparable funds (US Endowment universe).
- Achieved excellent results via strategic allocation, high-quality research, and exceptionally smart manager selection.
- Replaced all of the existing Index Managers (60% of portfolio) and transitioned to a high-conviction portfolio that leveraged activist and absolute-return managers.

SUISSE SOCIÉTÉ GÉNÉRALE (SSG) PRIVATE BANKING, Geneva, CH, 1998–2008

Privately owned financial services firm that specializes in asset management and estate planning – \$174bn AUM and operations in 17 countries.

Promoted to Head of Private Asset Management (2007–2008)

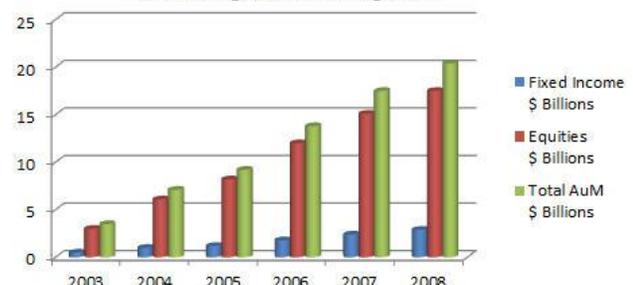
Promoted to Executive VP, (2004–2008)

Promoted to Senior VP, Head of Intermediaries (2002–2008)

During 2002–2008, SSG reorganized numerous times to improve internal efficiencies, scale up its asset base, and respond faster to market forces. Assigned additional and progressively challenging roles each year. Ultimately took charge of all fund research and asset management for private clients.

- During 2003–2008, created, developed, and implemented the External Manager Research Process, which ultimately drove an additional \$12bn AUM – and achieved higher profitability than SSG's hedge-fund activities.

Assets Under Management
New Manager Selection Algorithm



- Increased the SSG profile. Achieved personal recognition as one of Europe’s Top Fund Selectors.
- Created new single and multi-manager funds. Negotiated exclusive and strategically important partnership deals with firms such as Next-Generation LPP.
- As head of the newly formed Private Asset Management Department (2007–2008), led a team of 35 investment professionals that controlled more than \$20bn of multi-asset class portfolios and funds.
- Directly managed multi-manager funds – for example, SSG-HI Healthcare Expertise, and SGG-WG World Gold Expertise – as well as fund-of-funds such as SSG-MF Commodity.

Vice President and Portfolio Manager | International Team Leader (1998–2001)

Brought on board to update the private banking operations, particularly for overall organizational design and management of individual accounts.

- Promoted in 2000 and began leading the transition to centralized asset management, similar to the transition at Credit Suisse during 1993–1998. Managed a newly formed, 4-person team with 2 concurrent roles:
 - **Private Client Portfolios:** Strategic and tactical allocation, CHF portfolios, and the firm’s flagship fund.
 - **Financial Intermediaries:** Asset Management for multi-asset, fund-of-funds type portfolios for Swiss and European institutional clients and intermediaries.
- Personally managed *LO Opp Global Balanced Fund*, \$420m AUM flagship mutual fund, **which won the prestigious Lipper Award**. Also implemented a similar strategy for the institutional side.

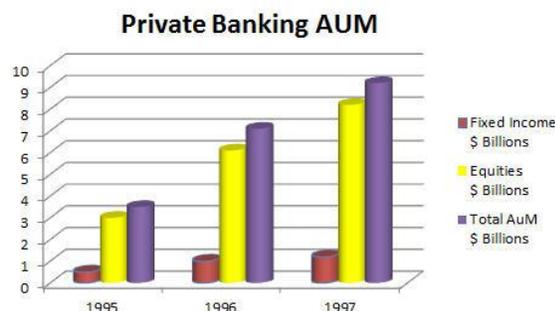
AKB PRIVATBANK, Geneva, CH, 1985–1998

Global financial services company, HQ in Zurich, CH - \$1.2tr assets and operations in 50 countries.

Vice President and Portfolio Manager, Private Banking (1994–1998)

Achieved a major – and unusually early – promotion to VP, based on exceptional client-relationship skills and strong performance on the asset-centralization project. Led a six-person team that ran the Private Client Portfolio (total value more than \$1bn). Focused on CHF tactical asset allocation and US equity research.

- Led team that established uniform management of discretionary mandates across different branches and reference currencies.
- Played key leadership role on several investment committees. Led development of a unique and highly successful methodology for strategic asset allocation, tactical execution, and implementation.
 - New strategic asset allocation methodology was tested in Geneva and became so successful that it was quickly rolled out for all AKB private banking throughout Switzerland.
 - Used the new methodology to design a custom-tailored portfolio – 80% fixed income and 20% equities – for an ultra-high-net-worth individual with \$500m assets.



Associate, Regional Branch Supervisory Assistant, Geneva, CH (1990–1993)

Bank Apprenticeship, Geneva and Zurich, CH (1985–1989)

Rotated through various departments during a comprehensive apprenticeship program. Acquired expertise in Private Banking while completing an apprenticeship and academic program in banking and economics.

- Showed exceptional talent for relationship building with the internal Private Bankers and high-net-worth clients.
- Hand-picked for an urgent project in 1993 – the centralization of asset management for all CS branches in Geneva – and collaborated with the senior leadership of nearly 30 bank branches in Geneva.

EDUCATION, PROFESSIONAL DEVELOPMENT, AND CERTIFICATIONS

B.A. Equivalent, Diplôme d’Expert en Economie Bancaire, 1990–1993
 Chartered Financial Analyst (CFA), 2001 • Certified European Financial Analyst (CEFA), 1997
 Analyste Financier et Gestionnaire de Fortune, 1997 • Certificat Fédéral de Capacité, 1988
 IMD Leadership Seminar, Lausanne, CH, 2007 • Goethe Institute, DE, 1989

This person was an extremely demanding client and a stickler for accuracy. I've heavily disguised his details.

He's a very high-profile financier who is frequently quoted in European investment media (BBC, AFP, CityWire and many other outlets). He needed a blue-chip English language resume – on very short notice – to present to a leading, private equity firm in NYC.

So the paper size, spellings, and so on are mostly standard US style. Some of the financial abbreviations are closer to Euro style, but client dictated those details. His original resume was more like an investment-strategy document – it had no beginning and no end – so this client was a little shocked at the final result – like night and day.

BTW he got the job! No surprise, because he's an internationally known expert in his field. I checked him a few weeks later and his news was all over the Internet.