

Family Office Executive

Exhibit a track record of driving business expansion by maintaining family asset integrity/evaluation and executing strategic investment/operational plans.

Excel at directing preparation of financial statements, tax returns, and periodic portfolio reports to evaluate financial performance and business value for decision-making. Proven record of liaising with external advisors, encompassing lawyers, trustees, and accountants to execute family-directed strategies/initiatives. Competent in prioritizing workflow, delivering concurrent projects, and establishing an operating environment focused on ethical standards and the family's core values. Capable of steering entire aspects related to investments, properties and structures, whilst offering personal services, such as household staff leadership and travel arrangements.

Areas of Expertise

- Business & Financial Risk
- Business Analysis & Valuation
- Risk Assessment & Mitigation
- Environmental, Social, and Governance
- Budgeting & Forecasting
- Process & Operational Excellence
- Cross-functional Leadership
- Tax Optimization
- Cost & Financial Planning
- Board Level Engagement
- Corporate Governance
- Regulatory Compliance

Key Accomplishments

- Liquidated company and executed termination strategy to facilitate Webb Fontaine in closing the regional office division and streamlining group operations. Led reviewing, exiting, and novation of 30 contractual agreements by implementing essential strategies, encompassing headcount reduction, termination and transfer, financial account closure, and external audits, Fintech/AI induction, and new staff onboarding. Defended legal claims of \$15M+ and reduced tax exposure on closing dividends and income tax.
- Achieved operation readiness within six months of contract signing, enabling Webb Fountain Group to secure an internationally awarded government contract. Oversaw directorial operations, such as staff recruitment, service level agreement drafting, affiliate partners consultation, IT support tools identification, and design implementation with IT teams.
- Drove business continuity within six months by integrating operations, such as orchestrating working proposals to integrate systems, processes, and people covering comprehensive work streams and resource duplication by partnering across the business, while conducting analysis of critical business areas to notify relevant stakeholders, including trading houses.

Career Experience

Director-Company Secretary, Head Internal Audit, Webb Fontaine, Dubai

2013 – Present

Lead corporate governance activities by progressing in an independent private wealth management role. Oversee liquidation, local compliance, and business support provision to executives in companies across several countries. Facilitate independent accountants and lawyers regarding financial matters, accounting, and contracts across business territories. Organise financial processes and business continuity across regions along with supervising internal controls, cash, stock, receivables, and fixed assets. Maintain compliance with local legislation in taxation, labour law, registration, and service level agreements areas. Conduct comprehensive internal audits across Africa, Asia, Armenia, and Europe.

- Defended tax claims of \$15M+ by optimising tax and liquidating holding group in Geneva.
- Acquired eight corporate set-ups by supporting commercial initiatives, such as business strategy formulation, competitor analysis, due diligence on prospective sponsors, revenue integrity, cost administration, and budgeting.

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- Promoted to Head of Audit & Corporate Secretary, by gaining owners' trust while managing his private wealth portfolio, including real estate assets.
- Diversified business portfolio and directed Fintech, Artificial Intelligence, and architecture initiatives.
- Concentrated the company's position by facilitating the fulfilment of major international contract win.
- Saved millions of dollars by executing investigations and dismantling fraud risks.
- Devised business transformational activities and boosted efficiency in tax systems across the organisation.

VP Business Operations, RWE GmbH (Supply & Trading), Germany /Switzerland

2008– 2012

Oversaw business transformational operations throughout program execution, health and safety, business continuity, and infrastructure leading to business acquisitions. Orchestrated efficiency programs to fortify accountability and governance through updated KPI metrics and monthly balanced scorecards. Leveraged relationships with state authorities, GTSA representatives, and stakeholders. Executed strategic business activities to merge business processes and secure board endorsement.

- Led an eight-person team specialised in trade licenses, business continuity, and infrastructure.
- Promoted to a global leadership role for administering of executive affairs by delivering exceptional performance across business operations functions.
- Fostered high-performance culture by conducting new initiatives and approaches.
- Ensured highly optimised and tax-efficient company setups through strategic business planning.

Director, Financial and Administrative Asset Management, UBS, Switzerland

2004– 2008

Performed financial and administrative oversight across Real Estate Investment portfolios in regard to Ultra High Net worth/High Net Worth (UHNW/HNW) clients. Spearheaded documentation in adherence to SOX and International Jurisdictions.

- Oversaw 50 legal entities worldwide in high-yield, closed-end tax-efficient funds, including Islamic sharia-compliant offerings.
- Fostered relationships with regulatory authorities, suppliers, banks, industry bodies, and consultants.

Additional Experience

Head of Financial Control, Rolex, Geneva, Switzerland

Deputy Head of Consolidation, Nestle, Vevey, Switzerland

Senior Manager, Société Int'l Télécoms. Aéronautiques, Paris, France

Senior Financial Controller, Philip Morris International, Lausanne, Switzerland

Education

BSc. (Hons) International Business & Modern Languages

Aston University, Birmingham, UK

École Supérieure de Commerce Bordeaux

Erasmus Program

Licenses & Certifications

Chartered Institute of Management Accountants, CIMA, UK

Certified Anti-Money Laundering Specialist, ACAMS, CAMS, 2023

Managing Successful Programs, MSP, APM Group, 2010