

## PATRICK J. BEROIZA

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### PROFESSIONAL SUMMARY

Bilingual International MBA. 8 years of Financial Institution experience in Latin America and New York. Skilled in fixed income trading, financial analysis, Excel modeling, corporate finance and acquisitions. Developed and maintained large client base of banks, institutional investors, and high net worth investors in the USA, Europe, Asia, and Latin America. Dual citizen of Chile and USA.

### EDUCATION

LSE - THE LONDON SCHOOL OF ECONOMICS AND POLITICAL SCIENCE  
**International Economics and International Relations** London, ENGLAND  
May – August 2015

MOORE SCHOOL OF BUSINESS, University of South Carolina  
**International Master of Business Administration (IMBA). GPA 3.9 / 4.0** Columbia, SC USA  
July 2013 – May 2015

ITESM – Instituto Tecnológico Estudios Superiores de Monterrey (Tec de Monterrey)  
**Intensive Spanish language training and business overview** Guadalajara, MEXICO  
March – June 2014

LEHIGH UNIVERSITY  
**Bachelor of Science in Business Administration. Major in Finance. GPA in Major 3.56 / 4.0** Bethlehem, PA USA  
August 2004 – May 2008

### EXPERIENCE

CORPORACIÓN ANDINA DE FOMENTO (CAF) – *multilateral development bank that finances private and public sector borrowers in Latin America, more than the World Bank and the IADB combined* Lima, PERU  
July – December 2014

#### **MBA Finance Intern, Microfinance and SME group**

Analyzed credit and financial statements of current and prospective clients. Performed due diligence and coordinated negotiations.

- Created a report analyzing CAF Microfinance and SME investments in Excel and Word, that assessed impact on Andean region.
- Translated pamphlet and film from Spanish to English, *Andean Biotrade: 15 success stories in Colombia, Ecuador and Peru*, presented at the Sustainable Innovation Forum in December 2014, hosted by the United Nations UNFCCC COP20.

NEWEDGE USA LLC – *broker of financial products in firm owned by Société Générale, serving institutional clients and providing access to 85+ exchanges, 2700 employees in 14 countries* New York, NY USA  
February 2009 – May 2013

#### **Associate Director and Trader**

Sales trader on a daily basis of fixed income products and provided daily research and trade ideas for institutional clients.

- Part of a four person trading desk that contributed more than \$20 million revenue on an annual basis.
- Managed a proprietary intraday position in United States Treasuries.
- Built a portfolio of 35+ fixed income accounts comprised of hedge funds, institutional money managers, mutual funds, insurance companies, pension funds, broker-dealers, banks, transition accounts, and private wealth managers.
- Traded investment grade, high-yield, emerging market, sovereign, distressed and asset-backed securities, issues denominated in US Dollar, Euro, CHF (Swiss franc), BRL (Brazilian real), CLP (Chilean peso) and Pen (Peruvian nuevo sol).
- Developed extensive network of professional relationships in Latin America, Eastern Europe, Asia and the USA.

PALI CAPITAL INC – *New York-based boutique investment firm* New York, NY USA  
**Sales Trader**, International Fixed Income Trading group August 2008 – December 2008

Traded fixed income products with retail and institutional clients located in Latin America, Eastern Europe, and the USA.

- Established new accounts for the firm in Eastern Europe, Latin America and the USA.
- Contributed to the creation of a daily Emerging Market Research Newsletter distributed to clients of Pali Capital.

MAGNUS AGENTES DE VALORES SA – *Chilean investment bank* Santiago, CHILE  
**Finance Intern**, with increasing responsibility over 3 successive summers Summers 2005, 2006, 2007

Performed credit analysis of Chilean and Peruvian public companies.

- Assisted the valuation and bid for Chilean television station Chile Vision, valued at roughly \$320 million.
- Contributed to a financing Petróleos de Venezuela (PDVSA), national oil and natural gas company, with a compensatory payment system in the form of a coal contract, to develop a 350,000 unit public housing project across 7 regions of Venezuela.

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**LANGUAGES** ENGLISH and SPANISH.

**CERTIFICATIONS** Series 63 and 7 (NASD-FINRA USA).

**IT SKILLS** Bloomberg, Advanced Excel, Word, Outlook, PowerPoint, Phoenix Asset Management Software, Yield Book, Financial Modeling: DCF, Accretion/Dilution (M&A), LBO, Trading and Transaction Comps.

**ACTIVITIES** Tennis, Skiing, Golf, Soccer and International Travel.  
Trained at Nick Bolletieri Tennis Academy for 2 years, played in tournaments in USA, Europe and Latin America