

CURRICULUM VITAE



PERSONAL DATA

Name / SURNAME	Mirasol Maria ZURLO	
Place and Date of birth	Milano, October, 17 th 1986	Nationality: Italian
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WORKING EXPERIENCES

September 2011 – today	Personal Financial Advisor at Finecobank Via Vittor Pisani, 13 – 20124 Milano – Italia
Duties and tasks	Financial advisor for corporate and retail customers
Activities/Responsibilities	Conduct <u>client meetings</u> via phone or in person to assess needs Create <u>financial readiness plan</u> and <u>assist customer</u> Cultivate interpersonal <u>relationships with client and referral</u> Provide <u>solutions for complex client</u> requests while maintaining <u>fiduciary responsibility</u> <u>Review current portfolios and make recommendations</u> , includes estate, college funding, retirement and tax planning. Determine clients' current income, expenses, insurance coverage, tax status, <u>financial objectives</u> , risk tolerance and other information needed to <u>develop a financial plan</u> Make recommendations to <u>help my clients understand</u> their financial goals and how to reach their short/long term financial objectives Coordinate all aspects of <u>professional meetings and networking events</u> (locations and other details).

OTHER ACTIVITIES

May 2016	<u>DEFS exam commissioner</u> “Diploma in European Financial Services” organized by Efpa Italia (European Financial Planning Association). The task of a commissioner is to monitor, together with the Exam Responsible, the proper and right execution of the exam test.
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July 2013 – today

Member of the Rotaract Club Milano PHF (partner of Rotary International) – Secretary for the year 2014–2015; Sergeant for the year 2015–2016, President for the year 2016–2017.

During the years I served in the Club Board my tasks were organizing events and service activities, according to the Club's goals and economical balance; in order to make the most out of the Club's possibilities I undertook a comprehensive and continuous analysis of the Club factual data (attendance, responsiveness, etc) as well as empathic data (satisfaction of the members, etc). I also represented the Club with other Rotaract and Rotary Clubs. Throughout my engagement with Rotaract I took part in monthly charitable activities.

EDUCATION

September 2010

Degree in “Economia e gestione dei beni culturali” (Economics and cultural assets management), class 17, “Scienze dell'economia e della gestione aziendale” (Science of economy and management), at Università Cattolica del Sacro Cuore, finalmark 98/110.

Thesis in Financial mediator economy, title: “Studio dell'offerta alla clientela retail: il caso Banca Popolare di Milano” (“A study on the offer for retail customer: the case of the Banca Popolare di Milano”)

July 2005

High School Degree “Ragioniere perito commerciale programmatore” (accountant, business consultant, programmer), at Istituto Tecnico Commerciale “V.F. PARETO” Milano, finalmark 74/100

AWARDS, CERTIFICATES

December 2016

PF Specialist '17 Gold; golden medal in the category “Needs comprehension”. Certified UNI EN ISO 9001:2015

December 2014

Certification €fpa – European Financial Planning Association – European Financial Advisor

July 2011

OCF Exam registration in the Financial Consultant Register (AlboConsulentiFinanziari) with Consob approval n.331, 07/28/2011

POST-GRADUATION EDUCATION & UPDATING (Courses, Seminars, etc)

February 2014

“Neuro-linguistic programming” (PNL) at Accademia Italiana PNL.

September 2017

“Market abuse”

November 2016

“The behaviour profilation of the customer” and “consultancy to an entrepreneur client”

June 2015	“Global antitrust”
October 2014	“Insurance tools and inheritance planning strategies”
October 2013	“The fiscal variable in the insurance–security sector”
March 2012	“Regulation in insurance intermediation”
December 2011	“Privacy and personal data treatment” and “Regulation and administrative responsibility of the authorities”
November 2011	“Bank transparency”, “Anti–lauding regulation”, “Investments services regulation: consultancy, placement and order collection”
October 2011	“Investments logic” <i>Courses held by Financial Academy “Progetto Giovani” by Finecobank, Piazza Durante 11 Milano</i>

LANGUAGE SKILLS

ITALIAN	Mothertounge
ENGLISH	writing: B1; reading B1; speaking B1
FRENCH	writing: B2; reading B2; speaking B2
SPANISH	writing: B2; reading B2; speaking B2

PERSONAL SKILLS

Personal	Great adaptability, strong and cooperative team worker, sociable, positive, propositive, empathic.
Informatic	MS Office, Open Office
Sports	Judo, jujitsu, kickboxing
Driving licence	Italian driving licence type B

Registered for VAT

In compliance with the Italian legislative Decree no. 196 dated 30/06/2003, I hereby authorize you to use and process my personal details contained in this document

Mirasol M. Zurlo