



Daniel Anderson

FINANCIAL ADVISOR

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Core skills

- AI & Machine Learning in Trading
- Quantitative Portfolio Management
- Risk Management & Optimization
- Data Analytics & Market Research
- Strategic Investment Planning
- Client Relationship Management
- Cross-cultural & International Market Expertise

Certifications

- CFA Level II Candidate / Chartered Financial Analyst
- Certified Financial Data Professional
- Other relevant certifications

Experience

12xWealth — Senior Portfolio Manager

- More than 5 years
- Lead the development and implementation of AI-based trading systems that have significantly enhanced portfolio returns and risk management.
- Manage diverse client portfolios with a focus on quant-driven strategies, leveraging machine learning and data analytics.
- Collaborate with cross-functional teams to innovate investment solutions tailored to client needs.
- Monitor market trends and adapt AI algorithms to evolving market conditions, ensuring resilient and adaptive investment strategies.
- Maintain strong client relationships through transparent communication of strategy performance and market insights.

Previous Experience in Switzerland

Roles in asset management and financial analysis, focusing on quantitative research and AI applications in trading, providing a strong foundation in both traditional and modern investment techniques.

Education

Educational Background

- **Master's Degree in Finance and Investment**
University of Zurich, Switzerland
- **Bachelor's Degree in Economics**
University of Geneva, Switzerland

Professional Summary

Dynamic and results-oriented Senior Portfolio Manager with over 5 years of dedicated experience at 12xWealth, specializing in AI-powered trading systems and innovative investment strategies. Based in the US for the past 4 years, I bring a global perspective rooted in a strong educational and professional background in Switzerland. Proven expertise in leveraging cutting-edge artificial intelligence technologies to optimize portfolio performance, manage risk, and deliver superior client outcomes.