




# REBECCA GONZALEZ FLORES



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 26.09.1993

## Competences

- Microsoft Windows
- Client Operating Systems and Microsoft 365
- Client-server Technology
- Analytical Thinking
- Knowledge Transfer
- Bloomberg
- FactSet
- SAP Concur
- Windows 7 and Mac OS X

## Languages

Spanish, German : Native:

French : B2  
  
Good Understanding

English C2  
  
Expert:

Portuguese : B1  
  
Intermediate

## Hobbies

- Meditation
- Travelling

## WORK EXPERIENCE

**Client Associate, 10/2022 - Dato  
Neuberger Berman - Zurich – Asset Manager**

- Preparing meetings and creating and distributing presentations (marketing)
- Create and report call reports
- Work closely with relationship managers/sales for various factsheets for customers
- Plan and implement projects as well as evaluate them afterwards
- Maintain our internal data management in the CRM-System

**Risk/Debt Specialist, 12/2019 - 08/2022  
Viseca Payment Services AG - Zurich -E-Payment- Financial Services**

- Customer support in cases of fraud and blocking on credit cards (bank clients)
- Correspondence in case of questions in GE/EN/SP and FR
- Answer and clarify billing and credit inquiries
- Verify preventive transaction clarifications with compliance
- Maintain data transactions accordingly
- Reduce and increase credit limits (Only banks)

**Administrator, 05/2019 - 11/2019  
Switchplus (temporary) - Zurich – IT**

- Customer guidance in EN/GE and FR in the area of dunning
- Correspondence in the following concerns: notices and invoices
- Administration of parts of the hosting
- Inbound/outbound calls about various requests with sales
- Quickly and accurately complete tasks and plan ahead and accurately for upcoming days and weeks

**Operation and Finance Officer, 06/2016 - 08/2018  
Altis Investment Management AG - Zug -Asset Manager**

- Support the monthly client portfolio statement collection
- Collection and verification of underlying securities data and investment indices
- Support the head of operations in various task as financial accounting and business support
- Collect the required client portfolio benchmark information. Gather the portfolio mandate, fund holding and performance data
- Onboarding process of new clients (intermediary clients)

- Cultures

**Intern Wealth Management, 01/2013 - 02/2014**

**Chefinvest AG - Zurich - Wealth Management/ Family Off**

- Monthly adjustments of internal lists for family office/ wealth management
- Collecting expenses and evaluate them
- Execute stock market trading
- Onboarding of new clients and maintain data accordingly into system (avalooq)
- Graphic design of various internal presentations in EN/GE

## **EDUCATION**

**Master of Science** in Business Management 02/2024 till 03/2025

**EU Business School**

**Bachelor of Science** Business Administration, 05/2019 – 05/2023

**University of Applied Science - Zurich**

**Grade Average: 5.3**

- Advanced technical college entrance qualification - Vocational baccalaureate
- Commercial apprenticeship E-Profile
- EF Course abroad - advanced/ proficiency English