

Gabriele BARDI

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Strategic Project Manager with extensive experience in Asset Management and FinTech. Blending expertise in Digital Assets, Client Journey Design, and International Product Development. Recognised for delivering cost-effective solutions, orchestrating cross-functional collaboration, and leading to impactful outcomes. Working on the intersection of DeFi protocols and Alternative Assets to provide market liquidity, real-time valuation and reduce friction.

KEY COMPETENCIES

Strategic Planning & Execution | Digital Asset Management | Cross-Functional Leadership
Fast Product Shipping (MVPs) | Investment & Crypto Research | DeFi & Web3 Infrastructure
Stakeholder Alignment & Engagement | Data Analysis | AI-Powered Client Journeys

PROFESSIONAL EXPERIENCE

Strategic Project Manager @ Strategic Shelf Evolution

Zürich, Switzerland

UBS Asset Management Switzerland AG

June 2022 – January 2025

Driving technical innovation in the division, enabling the strategical merge of Credit Suisse fund offering with the UBS one. Recognised for exceptional collaboration results and delivering the most accurate view of the AM business.

- Spearheaded the operational integration of a \$1.7 Trillion product shelf as part of the historic UBS acquisition of Credit Suisse. Leveraged data-driven frameworks optimize asset allocation and product shelf management.
- Leading roles in the **discretionary mandates** space, managing cross divisional, international and high complexity projects delivering user-centric product design, adherence to compliance requirements, high stakeholder engagement, clear approval from regulators, coordination of software engineers and go-to-market strategies.
- Developed automated **data tracking & visualization** systems to monitor and analyze products shelf, portfolio managers, market trends and more. Enabling data-driven investment decisions and effective Product Shelf Strategy.
- Key Achievements: Drastically improved UHNW APAC Client Experience and Onboarding process with the launch of a new discretionary mandate model, fruit of tireless collaboration between Global Wealth Management and Asset Management that saw inflows from the region of \$300Mn in the first year.

Automation Solution Developer

Zürich, Switzerland

UBS Business Solutions AG

March 2020 – May 2022

Developed and managed automation initiatives in an Agile environment to optimize workflows, enhance decision-making, and improve scalability. Integrated APIs, SQL queries and Python programs to streamline processes and reduce manual workloads.

- Analyzed requirements to plan and prioritize RPA implementations, reducing costs and operational risks while boosting productivity and sales.
- Designed and developed user-centric UI and intuitive UX to deliver complex and volume-heavy front-to-back process automations, improving accuracy, efficiency and client satisfaction.
- Rapidly addressed change requests and outages to maintain system integrity, ensure compliance, and adapt to shifting market demands.
- Key Achievements: saved 950+ hours/month of manual labor (~6 FTE), significantly scaling output volume, quality, and profitability.

Project Manager (intern)

Lugano, Switzerland

Feracs Asset Management & Advisory SA

April – August 2018

Supported asset manager in discretionary portfolio management, securitisation activities and business development in the Digital Assets industry.

- Established and managed strategic partnerships with international DeFi intermediaries..
- Led due diligence for securitization and listing of debt instruments on European financial markets.
- Conducted market research and assisted in discretionary portfolio management to optimize asset allocation.

EDUCATION

Università della Svizzera italiana

Master's in Finance - Major: Digital Finance

Lugano, Switzerland

September 2018 - February 2020

Advanced Derivatives | Structured Products | Machine Learning - AI | [Blockchain & Cryptocurrencies](#) | FinTech Ventures

Università della Svizzera italiana

Bachelor's in economics – Major: Finance

Lugano, Switzerland

September 2015 – June 2018

Thesis: “*Blockchain Opportunities*”, Prof. Giovanni Barone-Adesi.

AWARDS

UBS Collaboration Award

Awarded for the launch of the mentioned new discretionary mandate model in the APAC region. It required ongoing coordination between teams, divisions, and entities across various regions, time zones, and cultures in order to meet the highest standards while adhering to regulations and internal policies.

TECH

IT Experience

Data Analysis & Automation | Generative AI | Computer Vision | Digital Asset Management | Presentation Skills | e-Commerce | Web-app Development | Meta Business Management & Advertisement | Jira | GitHub & GitLab

Coding and Software Experience

Python | R | SQL | Rust | Solana + Metaplex (Tokenization) | HTML | Alteryx Workflows | Automation Anywhere | Tableau | PowerBI | PowerPoint | Excel | BloombergTerminal | [GitHub Repositories](#) | Render | Vercel | Curosr.ai

CERTIFICATION

CAIA

Lv.1 - Passed. Currently preparing Lv.2.

LANGUAGES

Italian - Native | English - Proficient | Spanish and Portuguese - Intermediate | German - Learning

ADDITIONAL

ToXen - <https://toxen.zenithdynamics.ch/>

Developing a Solana-based asset tokenization engine for private markets, enabling fractional ownership and liquidity for alternative assets. A B2B platform that will allow institutional asset owners to issue, trade, and manage tokenized assets with integrated KYC/AML compliance and automated revenue distribution. Currently in MVP development of the Web App and a PoC focused tokenizing an investment fund.

NoSwipe

Side project to test and deploy **Gen AI**, **LLM**, **ML** and **Computer Vision** algorithms. Successfully completed a proof-of-concept (PoC) phase, showcasing innovative user preference inference optimization and scalable business potential for a next-generation matchmaking platform. Currently deployed backend, frontend and API as web application.

Nord Home

An e-commerce store for Scandinavian furniture and design. Reached breakeven in 3 Months. [Enjoy 20% off here!](#)

Interests

- Scaling financial opportunities to non-institutional investors. Develop software with AI. Building Drones.
- Brazilian Jiu Jitsu Student & Teacher | Avid Skier | Surfer | Diver