



Isabelle Dinner

VR CAS / VR Zertifikat IMP-HSG
Master in Business Innovation Engineering for Financial Services | ZHAW
Swiss-certified financial planner / IPMA-certified project management
SALT-ASFC Leadership certificate

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Overview

Management Team leader in Wealth Management, Swiss Private, Risk Management and Compliance (Global up to 22 employees) in Banking-sector

Customer experience Long-standing customer adviser and financial planner / Sales and commercial expertise

Risk and Compliance Specialist in Crossborder regulations / Global Risk

Projects and Change IPMA-certified project management | Define of new services | digitalisation projects | regulatory projects | departmental reorganisation | change management (Agile at Scale)

My strengths highly motivated, strong commercial and sales expertise with deep expertise of Risk and Change-management | good organisational skills and decision-making ability | solution-oriented

Professional experience

04/2022 – present **Credit Suisse AG Zürich** | www.credit-suisse.com | Director
Team Head Market Access Challenge Swiss Bank/WM (2LoD)
Testing travel and non-travel CB activities for WM & Swiss Bank and IB / AM global
Design and roll-out a new global CB framework for all division and implement new CB guidelines / regulations and minimum standards
Define a new CB process with automated controls via a new Travel Tool (GATE)
Participate in various internal CB committees
Ensure reports on CB data and managed all relevant CB stakeholders
Advise client advisors on country manuals and internal directives and rules
Manage seven employees in Switzerland and Luxembourg / USA

04/2020-03/2022 **IWM Business Risk Team Leader (1LoD)**
Management of a team of six employees in the area of risk management
Co-chair of the IWM Risk Committee

Responsible for making changes to relevant framework policies and implementing effective key controls in IWM
Escalation management for various committees and supervision of control governance
Collaboration on and management of various projects such as IWM 1.3 (digitalisation)
Organisation, document preparation and implementation of 40 risk meetings per quarter
Coordination of conceptual and operational issues and development of the Challenger Session concept

05/2018 – 04/2020

UBS AG Schweiz | www.ubs.com | Director

Middle Office Team Leader, Digital Transformation Maintenance; Operation division

Implementation of new tools and services and development of 22 employees

Sub-project leader in planning, analysis and process optimisation and strategic alignment, including workshop training

Recruitment and development of employees

Outcomes: collaboration on the major strategic project 'Digitalisation' in relation to the roll-out of new services, including communication, team building and transformation

08/2016 – 04/2018

Business Risk & Management Team Leader; (1LoD) Corporate Centre division

Management of five employees and responsible for process optimisation and risk management in the crossborder, tax and payment area

Creation of decision-making bases for senior management and improving processes / standards and regulations

Sub-project management: VCP project and AIE implementation | Project framework for EMA results

Outcomes: restructuring with improved synergy effects (project leader of large-scale strategic project on Swiss tax)

Increase in efficiency through the implementation of a new service for customer advisers

04/2014 – 07/2016

Team Leader, International Wealth Management division

Responsibilities: Management of 14 employees

Active acquisition of new customers and implementation of potential analysis

Outcomes: Team Change project: redesign of actual client accounts, which enabled generation of large amounts of new money and mandates

Avaya project: partial automation of the new telephone system

04/2009 – 03/2014

HNWI Customer Adviser, Wealth Management & Swiss Banking Business division

Targeted development of existing customer relationships

Provision of overall advice as a Swiss-certified financial planner, including pensions

07/2006 – 03/2009

Private Customer Adviser, Wealth Management & Swiss Banking Business division

Advisory services and purchase of products and services for Core Affluent segment; team leader representative

07/2005 – 06/2006

Senior Assistant, WM North America International Wealth Management division

Provision of support to the customer adviser in administrative and organisational matters

02/2000 – 06/2005

Assistant | South Asian Team, UBS AG International Wealth Management division

01/1998 – 07/1999

Verwaltungs- und Privat-Bank AG | Trade Consultant | Vaduz, Liechtenstein

01/1997 – 12/1997

Revi-Trust AG | Consultant | Vaduz, Liechtenstein

Education and training

March 2021	Master in Business Innovation Engineering for Financial Services ZHAW
2020	CAS Financial Business Innovation
2020	CAS Financial Service Design
2019	CAS Competence-Oriented Project Management ZHAW IPMA Certified Project Management Associate Level D
2018	CAS Business Management ZHAW (agile transformation)
2017	CAS Change Management FHNW
2016	CAS Management & Leadership CAS ZHAW
2015	Seminar on development and management of employees: communication certificate EB Zurich
2010	SALT-ASFC Leadership certificate Swiss Association for Leadership Training SALT
2005 – 2007	Swiss-certified financial planner IFFP Institute for Financial Planning Zurich
1993 – 1996	Commercial apprenticeship (Swiss certified) Neu Technikum, Buchs
Specialist topics	Participation in seminars on subject-specific qualifications
2004	Certificate in Wealth Management UBS AG

Additional qualifications

IT	CRM systems project management tools MS Office, Excel
Languages	German: mother tongue English: fluent to business level

Further details

08/1999 – 12/1999	Stay in Canada and the US to improve language skills
08/1996 – 12/1996	Stay in the UK to improve language skills Philips Exeter Academy
Since 2010	Volunteer: active member and coach at YES (Young Enterprise Switzerland)
Networks	BPW and Women's Circle
Interests	Mountain biking Italian cooking crime novels hiking sailing
Contact information	Seestrasse 143 B 8800 Thalwil Place of origin: Salez-Sennwald
Date of birth	24/04/1975
Marital status	Single