

# Miki Halika

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30 Habarzel st Tel Aviv. Mobile 053-8210095

## WORK EXPERIENCE

### **Olympico Asset Management Ltd – Tel Aviv**

**2015- Present**

#### ***Founder – CIO***

- Privately held company that handles investment management and wealth management for a wealthy family.

### **UBS Wealth Management – Herzliya**

**2014 - 2015**

#### ***Director- Investment Advisory***

- Implement a clear strategy for developing client base, Net New Money and long term relationships.
- Responsibility for all prospect/client relationships to meet all legal and regulatory requirements, UBS guidelines and policies
- Full responsibility for the client relationship development with a main focus on strategic advice
- Work in close collaboration with the relevant teams by applying clients' needs in order to jointly develop an appropriate investment strategy.
- Provide extensive knowledge of target market and develop strong networks and door openers
- Holds UBS Wealth Management diploma.

### **JVP Jerusalem**

**2010-2014**

#### ***Managing director - single family office (Erel and Debbie Margalit)***

- Full responsibility for aggregate total assets (liquid and non-liquid).
- Building the optimal asset allocation strategy.
- Preparing a monthly and/or quarterly comprehensive report consolidating all the assets.
- Coordination with the relevant banks where securities are held, checking and supervision of movements in the various accounts and investments. Persistent contact with the investment managers.
- Deep knowledge in capital market such as equities, fixed income, hedge fund, Private equity and real estate.

### **EDMOND DE ROTHSCHILD – INVESTMENT SERVICES LTD, Tel-Aviv**

**2006-2010**

#### ***Senior Account Manager***

- Work with the Israeli bank system, private banking and investment consultants.
- Responsible for managing all aspects of relationships with clients.
- Recruiting high net worth clients for portfolio management in Israel and Switzerland.
- Part of an advisory team covering and providing investment recommendations to clients (Fixed income, equities, cash and hedge fund).
- Licensed investment marketing manager by the Israel Securities Authority.

**ISRAEL ARMY****1998-2000**

Adjutancy department, developing and research base, Gilot.  
Served as an exceptional athlete (swimming).

**EDUCATION****THE INTERDISCIPLINARY CENTER: ARISON SCHOOL BUSINESS, Herzliya, Israel****2002-2006***Bachelor of Arts in Business Administration*

Major: Marketing &amp; Finance

**Olympian – Swimmer**

- President of Israel swimming association 2021- Present
- Member of the Israeli Olympic team. 1998-2005
- Israeli champion in 400 m. IM and record holder nine years in a row.
- 10<sup>th</sup> place at the Olympic games Sydney 2000
- Bronze medalist in World Championship in Athens. 2000
- Silver medalist in European Championship in Istanbul. 1999

**Skills**

- Languages: Hebrew - native tongue; English/Spanish – fluent
- Proficient in: Excel, PowerPoint, Word, CRM, CBWB