



NICOLAS PALMITESSA

Wealth Management and Insurance Specialist | Financial Markets | Expertise in B2B and B2C Sales

Luxembourg

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Life insurance

Wealth management

Private Banking



EXPERIENCES

Senior Business Development Manager

Swissquote Bank Europe - Since January 2025 - Full-time - Luxembourg



Swissquote

- Manage and develop relationships with external asset managers, independent financial advisors and family offices
Developing life insurance solutions including DIF (dedicated internal funds) and SIF (specialised insurance funds) with our insurer partners.
Build and implement plans to grow sales of the bank's services and solutions
Participations in events, conferences and marketing activities

Head of french IFA / Family office sales team - Life Insurance

Baloise Vie Luxembourg - April 2011 to September 2024 - Full-time - Luxembourg



- Network animation : Private Bank, Wealth Planner, Family office, Asset Manager, IFA
Supervision of a team assisting with business development initiatives
Participation / Animation of conferences and presentations
Manage french clients, in France and abroad
Wealth planning and financials expertises : Life Insurance, Inheritance, Real Estate, Private Equity, Structured products, Credits, Loans
Advise partners / clients regarding assets management choice
Sale mainly B2B, but also B2C
Monitoring global tax changes

Professor External Consultant - Financial Market

ICN Business School - November 2011 to December 2014 - Consultant - France



- 3rd Year courses animation
Financial Market

Private Banker - Wealth Management

UBS Wealth Management - October 2007 to October 2010 - Full-time - Luxembourg



- Make investment recommendations and provide portfolio management services
Advise clients regarding investment strategies for equities, fixed income, foreign exchange as well as hedging strategies and alternative asset management classes

SKILLS

Wealth management

- Life insurance (5 stars)
Private banking (5 stars)
Financials Markets (5 stars)
Asset management (5 stars)
Tax studies (4 stars)
Structured product, private equity, alternative investments (4 stars)

LANGUAGES

- French (5 stars)
English (4 stars)
Spanish (2 stars)

- Advise clients regarding investments in capital markets and identify potential considerations specifically in foreign exchange and interest rate/currency products
- Provide financial planning services to individual clients including life insurances, trusts and estate planning
- Maintain client relationships as well as identify opportunities for new advisory assignments in new markets
- Monitor global financial market conditions including economic, political and legal environments to assess risk exposure
- Research changing client needs, individually and by segment, as well as market trends/development to identify opportunities for client accounts
- Make recommendations for product development of new custom products and services to meet client needs
- Identify and develop strategic business plans

EDUCATION

Master 2, Wealth planning - DESS Gestion de Patrimoine

FACULTÉ DE DROIT, SCIENCES ÉCONOMIQUES ET GESTION DE NANCY
FACULTÉ DE DROIT, SCIENCES ÉCONOMIQUES ET
2006 to 2007

The Master's in Wealth Management offers training in wealth creation and transmission strategies based on legal, tax, financial, but also marketing and commercial skills.

MSG

IAE METZ SCHOOL OF MANAGEMENT IAE METZ SCHOOL OF
MANAGEMENT
2003 to 2006

Trains specialists in financial analysis and financial markets.