

PERSONAL INFORMATION

**Josep Soler – Albertí**

Av. Josep Tarradellas 123 2nd floor. 08029 Barcelona

+ 34 93 412 44 31 - 619 465 725

josepsoler@iefweb.org

Sex M | Date of birth 01/08/1956 | Nationality Spanish

WORK EXPERIENCE

- 1990 – today **CEO**
 Institut d'Estudis Financers (IEF) - www.iefweb.org
 Overall management of the institution. Training coordination. Lecturing.
 Business or sector: Financial and Bank Training and Knowledge dissemination. Financial Literacy (EFEC Programme and others).
- 2000 – today **Chairman and founder**
 European Financial Planning Association (EFPA) www.efpa-eu.org
 General management and representation of the association.
 Business or sector: Financial Advice and Financial Planning. Standards, Qualifications and Professional Certification, for investor protection.
- 2000 – today **Treasurer / Board Director / Executive Director**
 EFPA España www.efpa.es
 Overall supervision on behalf of the Board.
 Business or sector: Financial Advice and Planning. Standards, Qualifications and Professional Certifications. Membership association.
- 2015 - today **Consultative Member**
 ESMA www.esma.europa.eu
 Member of the Consultative Working Group for ESMA's Investor Protection + Intermediaries Standing Committee, Paris.
 Business or sector: Financial regulation
- 1995 - today **Private Financial Advisor**
 Professional Practice
 Overall financial advice and financial planning of family and individual customers.
 Business or sector: Financial services
- 2007 - today **Board director (independent)**
 Tre Capital Partners SV & Mediolanum Gestión SGIC & Mediolanum Pensiones SGFP
 Advice, control and external judgment of company activities.
 Business or sector: Money (mutual and pension funds) management and financial intermediation.
- 2000 - 2003 **Chairman of the Board**
 EBTN (European Bank Training Network) www.ebta-association.eu
 As Chairman, general management of the association. Member of Board since 1994 till 2003.
 Business or sector: Bank & Financial Training. Largest European Association.
- 1987 - 1994 **General Manager**
 Databolsa S.A.
 Management of the company, a full subsidiary of Barcelona Stock Exchange for market data vendor feed commercialization.
 Business or sector: Financial markets & technology.
- 1990 - 1994 **Commercial Manager**
 Barcelona Stock Exchange www.borsabcn.es
 In charge of stock exchange's trade promotion towards market members, traders, money managers, etc.
 Business or sector: Financial Markets

- 1986 – 1987 **Senior Auditor**
European Commission
In charge of financial control and internal audit of EC expenditures of FEOGA (agricultural price mechanism), forest and fishing.
Business or sector: Public sector / financial control.
- 1983 – 1986 **Senior Commercial Consultant**
U.S. Dept. of Commerce
Public consultant to U.S. companies trading or starting to trade; investing or starting to invest in Spain and other Southern European countries.
Business or sector: Business or sector: Foreign trade / Public Sector

EDUCATION AND TRAINING

- 2016 **Real World Risk Certificate**
Real World Risk Institute, LLC
Decision making and codify a clear-cut way to approach risk
- 2001 **EFPA European Financial Advisor, EFA**
Financial Advice. EFPA España
Financial Advice and planning
- 1979 - 1980 **Research Diploma**
Accounting and Finance. London School of Economics (LSE)
Accounting, finance and competition policies
- 1973 - 1979 **Graduate (B.Sc.) and MBA**
Business Administration. ESADE
General and international business management
- 1974 - 1980 **Graduate (B.Sc.)**
Economics. University of Barcelona
Economic theory, regional economy and economic policies

PERSONAL SKILLS

Mother tongue(s) Spanish and Catalan

Other language(s)

	UNDERSTANDING		SPEAKING		WRITING
	Listening	Reading	Spoken interaction	Spoken production	
English	C2	C2	C2	C1	C2
French	C1	C1	C1	C1	C1
Italian	C1	C1	C1	C1	B1

- Communication skills** Lecturer, active participant in radio and TV economic debates; and professional dissemination in articles and consultative bodies.
- Organisational** Mostly involved in managerial and organizational work through the entire career. Responsible of different work teams for a total of 50 people.
- Job-related skills** Involved in European projects, not only at the professional level but also at political and social platforms.
- Computer skills** Good command of used office tools plus active in social networks (Twitter, LinkedIn, Youtube and Facebook).

ADDITIONAL INFORMATION

References Most of the bank financial professional community in Spain.