

Julien Duniague

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Swiss and French passports
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Married – 2 children (14 Yr, 11 Yr)
French – 42 (April 13th, 1982)

Work Experience

Managing Partner – Altitude Investment Solutions (ex-Atlantic Derivatives) – 2023

After a Management Buy-Out of the company from Atlantic Group, I focused and continued the development of both the Structured product and Wealth Management activities initiated in Atlantic Group in 2017.

Managing Partner – Atlantic Financial Group – 2017

Head of Structured Products and Wealth Management Activities

- Define and implement the strategy of Atlantic Financial Group in regard to its international wealth management activities (Paris, Monaco, Switzerland)
- Found, manage and develop a new company within the Group: Atlantic Derivatives: Advisory on Structured Products. 2 bn notional traded in 2022, 30% yearly organic growth. Development of a proprietary digital platform
- Actively involved in the commercial development of the Group activities
- Set strategic partnership with third parties
- Management of the commercial teams

Head of Private Banking – Société Générale Private Banking (Suisse) S.A. – 2013/2017 – (Managing Director), Member of the Executive Committee

- Define and implement the strategy of Société Générale Private banking Switzerland (SGPBS). Manage to increase RoA from 2013 to 2017 while reorganizing and “derisking” the organization
- Responsible for the realization of the budget: Net Banking Income, Return on Asset, Net New Asset, Cost, Gross Operating Income,
- Management of commercial teams in charge of the development of Mature Markets (Switzerland, Europe), Emerging Markets (Russia, Latam, Africa, Middle East, Eastern Europe) and External Asset Managers. 150 people
- Validation and follow up of the strategy and action plan deployed in each desk (about 10 different desks)
- Organize an efficient collaboration between bankers and respectively investment teams / support functions
- Meetings with clients. Go along with bankers in business trip to meet clients in strict respect of cross border rules. 30% of my time in average. Elaborate bespoke commercial strategies to increase business with our main clients on an individual basis
- Elaborate a Human Resources development plan (personal development, recruitments, upgrades)
- Make sure all internal and regulatory policies are well known and respected by commercial teams



- Member of the Middle-eastern, African, EAM and Commercial Directors boards within Société Générale Private Banking Group

Global Head of Investor Solutions & Services – Société Générale Private Banking – 2011 / 2013

- Manage the set up and development of the Investor Solutions & Services (ISS) department within Société Générale Private Banking (SGPB).
- ISS is a Client Facing department, part of the Market Solutions business line, and is composed of 21 collaborators located in different entities of the global SGPB network.
- ISS masters Structured Products and Derivatives techniques as well as commercial skills. He supports private bankers in their client relationship, meets clients and proposes them bespoke investment proposals
- That position involves as well an operational role for the Swiss entity of SGPB. Increase NBI over the period by 2.5 with complete change of organization
- Define and implement an action plan to develop collaboration between bankers and Investment specialists. Increase joint meeting between these 2 business lines
- Define and implement an action plan in increase collaboration with the Discretionary Portfolio Management team

Local Head of Structured Products Solutions – Société Générale Private Banking – 2007 / 2011

- In charge of the promotion and development of Structured Products and Derivatives investment solutions for SGPB in Luxembourg (2007 – 2010) and for SGPB in Switzerland (2010 -2011).
- Set up and implement the sales strategy to achieve quantitative and qualitative objectives.
- Come along with bankers to meet clients, especially UHNWI, and present them investment strategies based on Structured products and derivatives
- Manage to maintain and even increase NBI between 2007 and 2010 in Luxembourg (Mature markets) during the crisis thanks to a strong innovation mindset and proximity with clients

Structured Products and Derivatives Advisor – Société Générale Private Banking – 2005 / 2007

- Pricing and sale of Structured Products and Derivatives for the SGPB network
- Covered cross assets instruments (Equity, Commodities, Forex, Credit, Interest Rates, Hidden Assets).
- Position required to master technical and commercial skills.
- Develop internal pricers and tools in order to increase efficiency both in the preparation of Investment proposals and in the products follow up



Education

Master II - Banking Management and International Finance - 2005

University of Nice Sophia Antipolis. Specialized in Financial Markets, Investment Solutions, Marketing & Risk Management. Grade Upper First Class, Top Ranked Student

Master I of Economics (Finance) - 2004

University of Nice Sophia Antipolis. Specialized in Economics, Finance & Marketing. Grade Upper First Class, Top Ranked Student