

DANIEL SANTAMARÍA OTS

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EDUCATION

May 2010 – Oct 2011	COLUMBIA UNIVERSITY, School of International and Public Affairs Master of Public Administration , Program in Economic Policy Management	New York, U.S.
Sep 2009 – June 2010	INSTITUT D'ESTUDIS FINANCERS Postgraduate degree in Financial Planning <ul style="list-style-type: none">• European Financial Advisor (EFA™), designation awarded by the European Financial Planning Association	Barcelona, Spain
Sep 2004 – June 2005	INSTITUT D'ESTUDIS FINANCERS Postgraduate degree in Banking and Financial Markets <ul style="list-style-type: none">• Certified European Financial Analyst (CEFA®), designation awarded by the European Federation of Financial Analysts Societies	Barcelona, Spain
Sep 1998 – Aug 2004	UNIVERSITAT DE BARCELONA Bachelor of Arts in Economics	Barcelona, Spain

EXPERIENCE

Feb 2017 - present	Espacios Abiertos (EA) – Open Society Foundations Initiative Research Director <ul style="list-style-type: none">• Lead the strategy and development of policy reports related to fiscal accountability and government transparency in Puerto Rico	San Juan, Puerto Rico
Feb 2017 – Jan 2018	The Abdul Latif Jameel Poverty Action Lab (J-PAL) – Massachusetts Institute of Technology (MIT) Policy Manager <ul style="list-style-type: none">• Supervised two initiatives with the Department of the Family and the Department of Education of Puerto Rico• Conducted quantitative research under the supervision of Gustavo J. Bobonis (professor of Economics at the University of Toronto)	San Juan, Puerto Rico
Apr 2014 – Jan 2017	V2A – Vision to Action Strategic Management Consultants Management Consultant <ul style="list-style-type: none">• Co-directed the project of <i>Puerto Rico Banking Indicators Portal</i>: the most comprehensive database of performance and financial condition indicators available for the retail banking industry in Puerto Rico• Co-led the integration of 6 departments within the Latin American acquisition operation conducted by the world's largest international cable company with annual revenue of \$17.3 billion• Counseled in a 6- month due diligence project for the acquisition of 9 banks in Latin America with a value of \$6.2 billion in assets• Advised in a 6-month engagement supporting the turnaround of the individual financing business in the auto division of the main bank in Puerto Rico - \$35 billion in assets	San Juan, Puerto Rico
May 2012 – Apr 2013	GOVERNMENT DEVELOPMENT BANK FOR PUERTO RICO, Government of Puerto Rico Advisor to the Executive Vice President of Financing and Capital Markets	San Juan, Puerto Rico

- Advised the Executive Vice President on all financing proposals before they were submitted to the Government Development Bank's Board of Directors for consideration
 - Analyzed and followed the main financial indicators of the bank's balance sheet within the financial bank's committee
 - Co-led the structuring for the financing of several infrastructure projects including the main residential solar project in Puerto Rico
 - Managed the request for proposal process, structuring and negotiation of public-private bank syndicate project financing for a big multinational
- Facilitated statistical data to the country analysts of the main Rating Agencies

Oct 2011 –
Apr 2012

**DEPARTMENT OF ECONOMIC DEVELOPMENT AND COMMERCE,
Government of Puerto Rico**
Assistant Secretary of Economic Affairs and Trade

**San Juan,
Puerto Rico**

- Analyzed foreign trade statistics with the Puerto Rico Institute of Statistics and assessed new economic policy measures to the Secretary of Economic Development and Commerce
 - Interfaced with the World Economic Forum (WEF) and World Bank (WB) for the publication of their annual competitiveness reports which led to a rise of 11 positions to #31
 - Co-directed the Foreign Trade Board offering advice to the Governor's Office and the Secretary of the Department of Economic Development and Commerce
 - Directed Foreign Direct Investments from Asia and Spain to Puerto Rico
- Co-developed programs in the areas of foreign direct investment and export promotion

Mar 2006 –
May 2010

BANCO SABADELL
Asset Manager

**Barcelona,
Spain**

- Performed financial counseling for high net worth individuals, and managed a portfolio size of €300,000,000
- Managed the buying and selling of Fixed Income portfolio of €50,000,000
- Established new client relationship with an average asset volume of €10,000,000 per year, providing advice to clients with a minimum of €10,000,000 in assets
- Analyzed and assessed the evolution of alternative investments, such as renewable energies, hedge funds, private equity, real estate and structured products

Sep 2004 –
Feb 2006

BANCO SABADELL
Portfolio Analyst

**Barcelona,
Spain**

- Prepared and formulated financial planning presentations on investment risk profile, investment time horizon, tactical asset allocation and strategic asset allocation
- Performed trading, rebalancing and other portfolio management services
- Managed the buying and selling of Fixed Income portfolio of €6,000,000
- Assisted and conducted presentations on the evolution of the bank's mutual funds to clients with a Senior Portfolio Manager

LANGUAGES

- Native speaker in Catalan and Spanish; and fluent in English

ORGANIZATIONS

- Institute for New Economic Thinking: The Young Scholars Initiative (Member); Dinero Justo: movement campaigning for money and banking system reform (Founder)

CERTIFICATES

- Massachusetts Institute of Technology (MIT): 14.310x Data Analysis for Social Scientists

COMPUTER

- R, Stata, Tableau, MS Word, MS Excel and MS PowerPoint

SKILLS

**PROFESSIONAL
AFFILIATIONS**

- *European Financial Planning Association, EFPA™; Spanish and European Institute of Financial Analysts Societies, CEFA-CIIA; and Catalan Association of Economists*