

Prof. Dr. Erwin W. Heri  
Im Schründler 15  
8352 Rätterschen  
Switzerland

## Curriculum Vitae

Born on March 6, 1954. Attended Schools in Biberist and Solothurn. College (Matur Typus B) at Kantonsschule Solothurn. University degrees (lic. rer. pol., Dr. rer. pol.) at the University of Basel. During those times member of the Swiss National Table Tennis Team, several titles as Swiss Table Tennis Champion in the 60s and 70s.

Married to Theresa Heri-Jseli, 3 Children (born 1983, 1986, 1989)

### **Career Steps:**

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|-------------|---|
| 1980 -1983  | Assistant Professor and PhD-Thesis on the Determinant Factors Of Short Term Exchange Rate Fluctuations: grade: summa cum laude. Awarded the "Genossenschaftspreis der Universität Basel" for his research.  |
| Summer 1982 | Research Associate at the Institute for Social Research at the University of Michigan, Ann Arbor.   |
| 1983-1984   | Research Associate (Grant from the Swiss National Science Foundation) at the Economics Department, Stanford University, Stanford, Ca.   |
| 1985-1986   | Associate Professor for Statistics (Habilitation) at the University of Basel and Senior Consultant at the Economics Department of Swiss Bank Corp.  |
| 1987-1994   | <b>Swiss Bank Corporation, Basel</b><br><br>87-88 Vice-President and Deputy Chief Economist<br><br>89-91 Senior Vice-President, Head of Investment Research and Investment Funds. 1991 Awarded the Financial Innovation Award at the Finance Symposium in Gstaad. |

91-94 Managing Director, Global Head International Private Banking, Investment Funds and Asset Management.

1995-2002

**Winterthur Insurance Group/Credit Suisse**

95-98 Chief Financial Officer (CFO), Member of Group Executive Board Winterthur Insurance Group.

1997 Winterthur was acquired by Credit Suisse.

98-02 Chief Financial Officer and member of Executive Board of Credit Suisse Financial Services, Chairman of Credit Suisse First Boston (CSFB), Germany.

Since 2003

**Valartis Bank/Valartis Group**

Chairman of Board of Directors. Valartis is a publicly quoted Swiss Banking Boutique specialising in Private and Investment Banking and Asset Management. Valartis has Branches and/or Subsidiaries in Zürich, Geneva, Lichtenstein, Vienna, Moscow and St. Petersburg.

Erwin Heri has always kept good working relationship with the University of Basel and was teaching (and still is, a.o. Professor) courses in Financial Theory and Portfolio Management. For a while he also served as visiting Professor at Geneva University (HEI). He was Chairman of the Investment Committee of PUBLICA, the Government Pension Fund in Switzerland (until summer 2009). He serves on different Boards of Directors and is the Chairman of a Family Office in Switzerland.

He is the author of seven books on Financial Theory and practical applications thereof on an academic level but also for state-of-the-art “practical investments for the man on the street”. The most recent work appeared in 2004 (“Moden und Mythen and den Anlagemärkten”). A former title (“Die Acht Gebote der Geldanlage”, 1999) was a Bestseller in Switzerland and was translated into several languages, e.g. Chinese.

He has published more than 50 articles in Academic Journals and Monographs and is an occasional Columnist in Finance and Management Periodicals.

He is a member of the German “Verein für Socialpolitik” and its Chapter on Monetary Policy and Theory and a founding Member of the Swiss Society for Financial Market Research.