






Pietro Castelletti


Date of birth: 01/10/1996
Place of birth: Carate Brianza, Italy
Nationality: Italian
Gender: Male

CONTACT

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ABOUT ME

Financial service professionals with solid knowledge of financial markets, investment platforms and regulatory frameworks. Experienced in supporting and managing relationships with HNWI, ensuring a high standard of service in complex financial environments.

WORK EXPERIENCE

- **Fruit Wholesales Marketing Company** Lissone, Italy
Stage
30/04/2014 – 31/07/2014
- **Law Firm Bruno & Partners** Desio, Italy
Occasional Apprenticeship
30/11/2016 – 31/07/2022
-intern
- **Banker Consultant/Private Banker Assistant- BANCA MEDIOLANUM PRIVATE BANK** Milano/Monza, Italy
Financial planner
11/01/2023 – Current

EDUCATION AND TRAINING

- **07/2012** Vancouver, Canada
Economic/Linguistic Course University of British Columbia
Field of study Study Abroad
- **07/2014** New York, United States
Economic/Linguistic Course Manhattan College
Field of study Study Abroad
- **2010 – 2015** Seregno, Italy
High School Diploma Istituto Paci
Field of study Accounting
- **10/2015 – 08/07/2022** Milano, Italy
Bachelor Of Law Università Cattolica del Sacro Cuore
Field of study Business Address
- **09/2022 – 07/2023** Milano, Italy
Master Second Level Degree Università Cattolica del Sacro Cuore
Field of study Compliance in Financial Institution
- **11/2025 – CURRENT**
Micro Degree Financial Edge Training
Field of study Portfolio Manager

LANGUAGE SKILLS

MOTHER TONGUE(S): Italian

Other language(s):

English

Listening B2

Spoken production B2

Reading B2

Spoken interaction B2

Writing B1

Levels: A1 and A2: Basic user; B1 and B2: Independent user; C1 and C2: Proficient user

SKILLS

-Microsoft Office Suite (Excel – PowerPoint, Word) and Power BI | -AI (ChatGPT, Copilot, Gemini – applied to financial analysis) | -Basic Python and Streamlite for financial data handling and program banking tool | -Strong client relationship management and advisory experience within private banking

CERTIFICATIONS

- **EFPA- EIP (european investment practitioner)**
- **IVASS- (insurance intermediary- E section of RUI)**

PROJECTS

● **Entrepreneurial & Financial Innovation Projects**

Developing a financial planning tool to illustrate long-term wealth evolution and the impact of investment versus capital erosion through visual storytelling.

Co-founded a sneaker reselling venture, managing sourcing, pricing and client negotiations, strengthening my commercial and entrepreneurial skills.