

## CHRISTOPHER JOHN WHEELER

### PERSONAL DETAILS

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Date of birth: 23 March 1954

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### ACADEMIC ACHIEVEMENTS

**University of Edinburgh** 09/22-  
*PhD in History*  
*Supervisors: Dr. David Silkenat and Professor Enda Delaney*  
Recipient of the William R. McFarlane Scholarship

**University of Warwick** 09/20 to 10/21  
*Taught MA in Modern History*  
**Merit (67%)**

**University of Oxford (Harris Manchester College)** 10/17 to 06/20  
*History Undergraduate*  
**BA Hons in History (Upper Second).**

### BUSINESS CAREER

**Atlantic Equities** 01/15 to 07/17  
*Head of US Bank Equity Research*

Responsibility for building Atlantic Equities' research coverage of large cap US bank stocks including Citigroup, JP Morgan Chase, Bank of America, Wells Fargo, Goldman Sachs and Morgan Stanley. Clients were the largest global investors (pension funds, asset managers, hedge funds) based in Europe.

**Mediobanca** 04/10 to 12/14  
*Senior European Bank Research Analyst*

A major participant in building a team of 12 equity analysts covering 80 large European bank stocks. Personal responsibilities included Deutsche Bank, Credit Suisse, UBS, JP Morgan Chase, Goldman Sachs, Morgan Stanley and Julius Baer Group. Clients were the largest investors globally.

**MainFirst Bank** 10/08 to 3/10  
*Head of European Bank Equity Research*

Responsible for building MainFirst Bank's pan-European bank research product. Personal responsibility for banks including Deutsche Bank, Credit Suisse and UBS Also responsible for two colleagues covering the rest of the German bank sector and the large Austrian and Italian banks. Clients were the largest investors globally.

**Bear, Stearns International Limited**

**9/04 to 9/08**

*Senior Managing Director, European Equity Research*

Responsible for building a European bank and specialty finance research team of 11 professionals. Personal coverage included Deutsche Bank, Credit Suisse, UBS, Commerzbank, Deutsche Postbank, Erste Bank, and Raiffeisen International. Clients included the largest investors globally.

**Fox-Pitt, Kelton (acquired by Swiss Re in April 1999)**

**05/98 to 5/04**

*Head of Global Equities*

*09/02 to 5/04*

Responsible for a team of around 160 research, sales and sales trading professionals based in London, New York, Hong Kong and Tokyo, specialising in financial services equities. Clients included the largest investors globally.

*Head of European and Asian Corporate Finance*

*04/98 to 8/02*

Managed a team of around 55 professionals, based in London, Hong Kong and Zurich. The team provided M&A, Advisory and ECM products to the major financial institutions in Europe and Asia.

**Lehman Brothers**

**09/88 to 03/98**

*Executive Director-Financial Institutions Group  
to 03/98*

*10/93*

Was a member of a group of 25 professionals providing investment banking services to financial institutions throughout Europe and supporting Lehman Brothers Asia, where required.

*European Bank Equity Research Analyst and Deputy Head of Research*

*09/88 to 9/93*

Was a founder member of Lehman Brothers Pan-European Bank Equity Research Team. Personal responsibility for the coverage of UK, Irish, Spanish and Italian banks. Client base included the largest investors globally.

**Barclays Bank**

**04/79 to 08/88**

*Head of Long-Term Planning and Special Projects*

*03/85 to 08/88*

Reporting to the CEO and CFO of the Bank, led the team that prepared its annual long-term plan, managed the bank's capital adequacy in conjunction with Group Treasury, reviewed all the Bank's proposed M&A initiatives, and ran the Bank's investor relations activities. Led the team that completed the listing of Barclays Bank's shares in New York and Tokyo in 1986.

*Senior Accountant-Barclays Mercantile Credit*

*04/79 to 02/85*

Held a variety of planning and line roles in the Finance Division of Barclays Bank's leasing and consumer finance subsidiary.

**Armitage & Norton, Chartered Accountants (now part of KPMG)**

**09/72 to 03/79**

Trained as a Chartered Accountant, gaining audit, tax and trust experience.

**OTHER INFORMATION**

Life Member of the Institute of Chartered Accountants in England and Wales.

Governor of Kingham Primary School.