

# CESAR A. GONZALEZ

Strategic Finance & Quantitative Advisory Lead | M&A · Portfolio Strategy · AI-Driven Decision Systems

## GLEZ

Strategic Finance & Data Science



### CONTACT

[cesarglez.com](http://cesarglez.com)

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### FOCUS

#### Capital Allocation & M&A

Portfolio Strategy & Quant Systems  
Financial Decision Architecture

### EDUCATION

#### PhD Applied Economics

UNAM | 2023-2026 | AI, Data Science & Public Policy

#### MSc International Economics

UNAM | 2020-2022 | Top decile of class

#### BSc Finance & Banking

EBC Mexico | 2017-2019 | 1st in class | Honours

### LANGUAGES

Spanish — Native

English — Native

French — Fluent

Chinese — Intermediate

### LEADERSHIP COMPETENCIES

- Strategic thinking & synthesis
- Executive communication
- Cross-cultural leadership
- Client & investor relationship management
- Analytical problem solving
- Negotiation & capital markets

### EXECUTIVE EDUCATION

#### MIT IDSS

Data Science & ML 2022

#### Wharton School

AI for Business | Fin. Modeling 2019-23

#### Columbia University

Financial Engineering & Risk 2018-20

#### EDHEC Business School

Investment Mgmt, Python & ML 2023

#### NYIF | Google Cloud

ML for Trading 2023

#### Yale University

Financial Markets (R. Shiller) 2016

## PROFILE

Finance and quantitative strategy lead with 12+ years driving cross-border M&A, portfolio optimisation, and capital allocation decisions. Delivered 78.6% benchmark outperformance and built decision systems reducing analysis time by 85%. Trusted advisor to C-level executives and investment committees across Europe, LatAm, and Asia.

**Finance Decision Architect — influencing capital allocation and investment outcomes through quantitative systems.**

Targeting: M&A Advisory · Portfolio Strategy · Head of Quant/Analytics · Financial Decision Systems

#### Capital & M&A

M&A Advisory | Capital Structuring | PE | FP&A | Risk Analysis

#### Quant Systems

Factor Models | Signal Generation | Forecasting | ML | Decision Automation

#### Tech Stack

Python (ML models, portfolio optim., automation) | R | SQL | Power BI | Bloomberg | GCP

## KEY ACHIEVEMENTS

**+78.6%** benchmark outperformance across managed portfolios

**+250%** revenue growth in operational turnaround — #1 branch nationally

**4h→30min** analysis time reduced via automated decision systems

**3 continents** M&A transactions and capital structuring — Europe, LatAm, Asia

## PROFESSIONAL EXPERIENCE

### Principal | Lead Financial & Quantitative Advisor

2017-2020 | 2022-Present

**GLEZ Strategic Finance & Data Science** | Global | Finance & Technology Advisory

- Led cross-border M&A transactions in financial services and credit sectors — managing due diligence, capital structuring, and board-level investment presentations through to closing.
- Served as trusted quantitative advisor to C-level executives and investment committees across 3 continents — translating market data and forecasting models into capital allocation decisions and portfolio strategy.
- Automated financial reporting and operational workflows for SME clients — eliminating bottlenecks and cutting decision cycles from days to hours.

+ Led hostile acquisition — credit company, Panama

+ Co-created Private Equity fund — India

### Grants Manager

2025

**Eprogram** | Spain | Energy Efficiency & Sustainability

- Managed full grant lifecycle with Galician regional government (Xunta de Galicia) — authored justification reports and acted as primary liaison ensuring compliance and timely delivery.
- Reduced documentation workload by 50% and management time by 35% by leading the full digitisation and automation of internal grant workflows.
- Coordinated technical and administrative teams to align documentation with regulatory requirements, ensuring full compliance across all concurrent grant applications.

+ Documentation reduced by 50% | Processing time optimised by 35%

### Senior Consultant — Financial Analysis & Portfolio Management

2015-2021

**St. James International** | Mexico & Latin America | Wealth Management

- Achieved 78.6% benchmark outperformance across HNWI and institutional client portfolios — designing factor-based investment strategies and presenting performance analysis directly to investment committees.
- Built proprietary portfolio optimisation software in Python and R — applying graph theory, clustering, and log regression — saving 4+ hours of manual work per advisor per client.
- Grew Mexico office profitability by 47.3% and LatAm by 26.4% by establishing a cross-functional coordination team aligning headquarters with all regional branches.

## CERTIFICATIONS

Blockchain & Digital Assets 2022 — Financial Innovation College  
Digital Transformation Leader 2024 — Government of Spain  
Successful Negotiation 2017 — University of Michigan  
Financial Markets 2016 — Yale & Robert Shiller

## AVAILABILITY

Remote | Hybrid | Relocation (EU)

## INTERESTS

Hackathons · Powerlifting · Investment markets

+ Top portfolios company-wide — 2 consecutive years | +47.3% Mexico | +26.4% LatAm profitability

## Assistant Manager | Financial Advisor

2012-2015

**Tu Casa Express** | Mexico | Nationwide Mortgage Brokerage

- Turned around the lowest-performing branch to #1 nationally — 250% sales growth in year one and 120% in year two through strategy redesign and performance management.
- Implemented structured training and performance monitoring programmes that increased team engagement and cut staff turnover; promoted to Assistant Manager — youngest in company history.

+ +250% Y1 | +120% Y2 | #1 branch nationally | + Youngest Assistant Manager in company history

## STRATEGIC DECISION SYSTEMS & FINANCIAL MODELS

### Portfolio Optimisation Engine

Python · R · Bloomberg API · Markowitz · Monte Carlo · Graph Theory  
**85% faster** Cut advisor portfolio construction time by 85% (4h→30min) via automated signal generation and portfolio selection. Deployed across full LatAm advisory team.

### Credit Risk & Distress Scoring System

Python · XGBoost · Random Forest · Structured Financial Data  
**M&A due diligence** Early-warning bankruptcy risk model supporting credit analysis and investment decisions in live M&A due diligence processes.

### Equity Signal & Backtesting Framework

Python · LSTM · Fama-French Factor Models · Time Series  
**systematic strategy** Full investment research pipeline: factor signal generation, ML-based return prediction, and systematic strategy evaluation enabling data-driven portfolio tilts.

### Real Estate Capital Allocation Model

R · MySQL · Log-Linear Regression · EDA  
**+27.65% profit** Profit-maximising model for residential development — identified optimal unit mix delivering +27.65% above developer's original capital projection. 91% accuracy.

### Revenue Recovery Decision System

Python · SVM · Decision Trees · Random Forest  
**+30% revenue** Churn-prevention classifier for hospitality operators — flagging at-risk bookings and triggering retention actions. +30% projected revenue, 89% accuracy.

### Ad-Revenue Optimisation Strategy

A/B Testing · Sentiment Analysis · Behavioural Analytics  
**\$42.8K recovered** Recovered \$42.8K net revenue lost to ad-blocking users — combining A/B testing and sentiment analysis to convert ad-resistant audiences.

Full portfolio with live demos: [cesarglez.com](https://cesarglez.com)

## INTERNATIONAL FOOTPRINT

Europe (Spain, UK, Isle of Man, France) | Americas (Mexico, USA, Panama) | Asia (India, China)

## METHODOLOGIES & TOOLS

**Quantitative Finance:** Portfolio Theory (Markowitz) | CAPM | Fama-French Factor Models | DCF | VaR | CVaR | Efficient Frontier | Backtesting | Bloomberg Terminal

**Machine Learning & AI:** Python | R | XGBoost | LSTM | Random Forest | NLP | PCA | Clustering | Time Series | Monte Carlo

**Data & Infrastructure:** SQL | MongoDB | GCP | Azure | Docker | GitHub | ETL Pipelines | Power BI | Tableau

**Advisory & Delivery:** Agile | Scrum | OKRs | Roadmapping | Jira | Salesforce | Stakeholder Management | Board Presentations

