

PHILIPPE BOUTRON

Client Portfolio Manager • Discretionary Mandates and Multi-Asset Managed Solutions for Private Clients

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Thirty years in asset management and private banking. Portfolio manager of balanced discretionary mandates at Société Générale Asset Management for the bank's private clients, then fourteen years at SG Private Banking in open architecture: design of the bank's global investment process, head of investment strategy supplying the macro views, the asset allocation strategy and the investment themes to the advisory teams, chief investment officer for the Middle East heading the investment offering for the region and advising ultra-high-net-worth clients alongside the bankers, then business product owner of Synoé, the bank's investment advisory service. CEFA and CESGA. I am looking to return to discretionary mandates and multi-asset managed solutions for private clients, as the sparring partner of relationship managers and their clients.

EXPERIENCE

Corwyn Conseil • investment process consulting, founder since 2021

Audit of the investment process and non-financial maturity of a major French public investor; the strategic reorientation proposed was adopted by its management. SFDR and CSRD regulatory advice to around ten industrial SMEs, with reporting automation tools in production since January 2026.

Independent consultant (freelance) • assignments for City4U Holdings and Thread 2019 – 2021

Société Générale Private Banking • Paris and Dubai, open architecture 2005 – 2019

A private bank of around €90bn in assets, a third of it in discretionary mandates and funds.

Business Product Owner of Synoé, then Chief Product Officer of the intrapreneurial programme 2015 – 2019

The private bank's digital investment advisory service under MiFID II, recommending portfolios built entirely from funds: allocation framework, suitability and decision rules, delivery of recommendations to the client. Internal business case taken to executive management for budget approval. Launched in November 2018, opened to about 70% of the bank's French private clients, still in production.

Head of the Investment Process, Portfolio Management Services 2014 – 2015

Development of the private bank's asset allocation process and update of its benchmarking standards.

Chief Investment Officer, Middle East, Dubai (DIFC) 2011 – 2014

Head of the private bank's investment offering for the region. Investment advisory for ultra-high-net-worth clients, predominantly from the Gulf and expatriates, and for institutions, alongside the bankers: asset allocation and portfolio construction for clients, client investment reviews, support in client meetings, active prospecting. Revenues (net banking income) grew by about 15% a year over the three years. Selection and oversight of the external managers and of the fund universe distributed across the region, equities first. Head of the product specialist team.

Head of Investment Strategy 2008 – 2011

Asset allocation strategy of the private bank and investment themes supplied to the advisory teams, drawing on more than thirty specialists internationally. Direct management of the macroeconomic strategists and quantitative analysts who produced the market views. Ran the direct equities committee with the private bank's analyst-portfolio managers. Long-term allocation tool tailored to each client profile, built on bespoke VaR calculations.

Head of the Investment Process 2005 – 2008

Design and rollout of the private bank's global investment process: creation of the asset class committees, research structure, decision framework, control of portfolio management risk.

Société Générale Asset Management • portfolio manager 2000 – 2005

Balanced discretionary mandates for Société Générale's private clients, around €150m, including direct equity management. In charge of SGAM's investment committee and of its sub-committees, including the US equity stock selection sub-committee, run with TCW's managers. Member of SGAM's global investment strategy committee. Construction of tailored investment solutions.

Société Générale • regional marketing manager 1993 – 2000

SKILLS AND CERTIFICATIONS

Bloomberg • Morningstar • Excel and VBA • Python. Experienced user of AI tools, agents and RAG: Claude, ChatGPT, Gemini, Mistral AI, Grok, Perplexity, Julius.ai. MiFID II and the suitability framework, UCITS, AIFMD, SFDR, DIFC (Dubai). CEFA, Certified European Financial Analyst (EFFAS, 2002), the European equivalent of the CFA charter. CESGA, Certified ESG Analyst (EFFAS, 2022).

EDUCATION

Université d'Auvergne (2001): master's degree in financial markets and postgraduate degree in finance, both taken while working. TBS Education (1993): graduate degree in business administration, banking and financial markets major.

LANGUAGES AND NETWORK

French native • English bilingual, three years based in Dubai • Spanish intermediate. French Society of Financial Analysts (SFAF), unlisted securities committee. EU citizen, available immediately, free to relocate, including to Zurich.