

Curriculum vitae

Damian Tracz, CFA

Finance Transformation | FP&A | Capital Markets | Banking

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Summary

Senior finance and transformation leader with over 15 years of experience in financial & quantitative analysis, planning & forecasting (FP&A), projects ROI tracking, processes automation as well as investment portfolio management and assets valuation. CFA charterholder, licensed Investment Advisor and Stockbroker. Experienced manager, trusted business partner and excellent communicator with a proven track record across complex projects and initiatives (including company reorganizations, finance processes improvements and stress testing activities).

Professional Experience

- **01/2026 to present** – VP Finance Transformation in the HSBC Service Delivery (Polska) Sp. z o.o., Poland/UK.
- **06/2020 to 12/2025** – Head of Business Performance (CFO Area for Luxembourg & Ireland) in the HSBC Service Delivery (Polska) Sp. z o.o., Poland.
- **05/2019 to 05/2020** – Local Head / Finance Business Partner (Wealth Management EMEA Finance) in the UBS Business Solutions sp. z o. o., Poland.
- **04/2017 to 04/2019** – Local Head / Finance Business Partner (Global Wealth Management CFO Advisory) in the UBS Business Solutions sp. z o. o. Poland/Switzerland.
- **06/2014 to 03/2017** – Finance Business Partner (Wealth Management CFO Advisory) in the UBS Business Solutions sp. z o. o., Poland.
- **08/2012 to 05/2014** – Investment Advisory Manager in the Brokerage House Alior Bank, Poland.
- **01/2010 to 07/2012** – Stock Broker in the Brokerage House Alior Bank, Poland.
- **09/2008 to 12/2009** - Contact Center Specialist in the Brokerage House Alior Bank, Poland (part-time job).
- **07/2008 to 08/2008** - Intern in the Brokerage House Millennium (Department of Advisory and Research), Poland.
- **11/2007 to 07/2008** – Contact Center Consultant in the Brokerage House Pekao, Poland (part-time job).

Education

- **10/2005 – 07/2010** – Cracow University of Economics, field of study: Computer Science and Econometrics (master's degree)
- **10/2012 – 05/2013** – WSBiF Katowice – „Practical English for Banking and Finance” (postgraduate studies)

Professional Qualifications

- CFA charterholder (awarded in 2014)
- Investment Advisor License (number 584, awarded in 2019)
- Stock Broker License (number 2313, awarded in 2009)

Selected Educational & Volunteering Activities

- „Trampki na Gieldzie” (Mentoring role for kids – educational activity covering investment related topics),
- „CFA Research Challenge” (Mentoring role for participants),
- „Global Investments” (Academic Lecturer for students in the Cracow University of Economics as a part of the Global Service Centres endorsed studies).

Other Skills & Hobbies

Language skills:

- Polish – native
- English – full professional proficiency
- German – A2

Computer skills:

- Microsoft Office, Business Objects, Hyperion Essbase, IBM Cognos, TM1 and others
- Programming skills – VBA (intermediate+), Python (intermediate), R (basic)

Hobbies:

- Sports (snowboarding, Muay Thai), quantitative finance, capital markets, music.