



Bassem Younan

Qualifications Summary

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D.O.B. 13-08-1977 | Lebanon

Detail-oriented and diligent professional with extensive experience in consistently deliver results by identifying and evaluating high-performing private equity funds and effectively managing client relationships in SME lending space. Poised to excel in challenging new role. Proven ability to senior team in managing investment program by providing analysis, monitoring, and evaluation of assigned investment portfolios. Track record of determining and pursuing opportunities to expand client base by prospecting and acquiring new SME clients. Demonstrated success in reviewing client accounts, assessing financial health, and addressing potential issues. Adept at leading multifaceted teams for continuous performance improvement.

Familiar with (SAB, BANKS, EFRONT, Temenos T24, SunGuard, Moody's), and participated in developing an inhouse investment portfolio solution platform. "Certified Scrum Product Owner®"

Areas of Expertise

- ◆ Private Equity
- ◆ Portfolio Management
- ◆ Client Relationship Management
- ◆ Corporate & Commercial Banking
- ◆ Funds Management/Selection
- ◆ Business Development
- ◆ Financial Planning & Analysis
- ◆ Key Account Management
- ◆ Risk Management
- ◆ Relationship Building
- ◆ Team Building & Leadership
- ◆ Cross-functional Collaboration

PROFESSIONAL EXPERIENCE

September 2013
November 2023

Relationship Manager

Saradar Bank SAL–Corporate & Commercial Banking-SME

Responsibilities:

- Managing a portfolio of debtors commercial accounts
- Deal sourcing; pitching good businesses and best entrepreneurs profiles to lend with mutual attractive conditions
- Acquire new SME business customers to ensure a permanent growing SME portfolio
- Study and assess the financial condition of clients
- Maintain a regular contact with clients through site visits & meetings
- Acquire a core understanding of each customer's business
- Prepare and issue visit reports upon each appointment conducted
- Identify and study new business opportunities from existing clients, providers and/or any business relation
- Follow up on files renewal
- Prepare, evaluate and structure the corresponding credit requests
- Monitor changes in clients' indebtedness as per last CDR and obtain clear explanation from clients when needed
- Observe accounts' movement or warning signs by ensuring proper utilization and optimization of approved facilities and report any irregularity in this respect

April 2011 – **Deputy General Manager**
January 2013 Ras Al Khaimah Investment Authorities
RAK Offshore

Responsibilities:

- Working with more than 200 small, medium and big institutions, majority of them are legal, consulting and accounting firms.
- Developing the offshore registrar, by preparing new services to add value to the existing ones. (Trust, Foundations, International Business Companies)
- Promoting Ras Al Khaimah via RAKIA internationally.

October 2008 – **Investment Executive**
March 2011 Fondinvest Capital
Paris – France

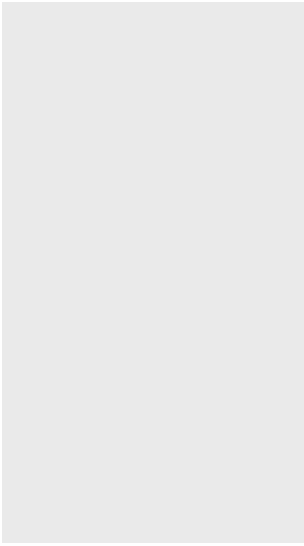
Responsibilities:

- Doing due diligence on European small and mid-market private equity (PE) funds and managers.
- Analyzing and recommending new investments in PE funds.
- Negotiating agreements with General Partners for better terms and conditions to investors.
- Monitoring, following up and managing existing portfolio of PE funds (quarterly updates and valuations, drawdowns and distributions).
- Representing Fondinvest on several Funds Advisory Boards.
- Sourcing deals in PE secondary market.
- Meeting with potential secondary sellers and following up in preparation for the deal.
- Analyzing secondary opportunities for sale (valuation, exit scenarios)

September 2000- **Assistant Vice President**
September 2008 BMB Investment Bank (Bahrain Middle East Bank)
Manama, Bahrain

Responsibilities:

- Managing the Bank's Private Equity funds Portfolio consisting of more than 30 funds (Venture Capital and Buyout) and USD250 million in commitments size.
- Reviewing and analyzing investments opportunities in the private equity markets (PE Funds) in the US and Europe, summarizing strengths and weaknesses, and preparing investments proposals to be used by the department head and the Investment Committee.
- Originating deals (due diligence, investment proposal), following-up, and documentation with fund managers.
- Managing capital calls and distributions (accounting, cash-flow, foreign exchange, and revaluation).

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- Preparing semi-annual reports from the fund managers' updates with recommendations for the Risk Management Committee.
 - Monitoring and calculating investments Net Asset Value.
 - Preparing reports and reviews to investors.
 - In charge of auditing internal procedures (with other departments).
 - Developing a new computerized system for the private equity funds portfolio.
 - Preparation of daily reports on international market activity

Education

Master 1 in Business Administration & Finance | Saint-Joseph University – Lebanon (1996 - 2000)

Diploma in Business Administration & Finance | Saint-Joseph University – Lebanon (1996-1998)

Professional Programs

- Corporate Finance for Executives at the Bahrain Institute for Banking and Finance – BIBF (4 days education program for executives on Financial Analysis and Cash Flow Forecasting, Investment Decisions and Value Creation – Financing Decisions) (2004)
- Private Equity & Venture Capital at the BIBF (5 days program on company valuation, techniques of valuation, investment exit process) (2005)
- Lebanese Financial Regulations (2014)
- Basel III and credit analysis (2014)
- Introduction to securities and investments (2015)
- Investigating suspicious money laundering operations (2017)
- Customer due diligence / understanding sanctions (2020)
- CSPO® - Certified Scrum Product Owner® - Scrum Alliance(2023)
- Entrepreneurship program (USJ/SIP/EC²) (2024)

Training

Three months training program at Audi Bank Lebanon (Summer 1998 & 1999) Over-The-Counter Operations, Accounts Opening, Mortgage Loans & Personal Loans

Languages **English** – Fluent | **French** – Fluent | **Arabic** – Fluent