

Robert Levine

Financial Analysis, Portfolio and Risk Management Experience



Robert is a global Financial Services professional who enjoys leveraging his 35 years of experience and technology to achieve management goals.

Robert earned his Ph.D. in Finance from the Swiss Management Center, his Professional Degree from University of California, Berkeley, his MBA from Baruch College, CUNY, and his B.S. in Economics from New York University.

Highlights

- He has a proven track record of transformational thought leadership, innovation, and change management at a number of blue-chip firms.
- He is a recognized leader of people and talent development, building teams and partnering with vast business networks that have consistently delivered ground-breaking accomplishments.

Professional Experience

- **BlockFi** – Supported the credit underwriting, structuring, and monitoring of BlockFi’s ~\$10 billion in unsecured and crypto-backed loans, repos, and swaps with hedge fund, prop traders, crypto native, and other financial counterparties, custodians, and exchanges, writing up credit proposals, performing counterparty investigations using Chainalysis and Nansen, structuring loan agreements, advising on and negotiating deals, establishing limits, formulating policy, monitoring loan performance, tracking covenant compliance, and conducting loan workouts.
- **RBC Capital Markets** – Responsible for global funding and lending strategy and program management for the secured funding business, including product vision and roadmap, product strategy, organizational design, systems architecture (Apex / Anvil / Loanet / Sophis) and operational enhancements, risk management and hedging projects, regulatory enhancement projects, financial planning and analysis, budgeting, new product governance, and strategy implementation across North America, the Caribbean, Europe, and Asia.
- **UBS** – Responsible for hedge fund credit from underwriting, investment manager selection and due diligence (financial, operational, benchmarking), structuring, negotiating risk-relevant loan terms, credit review, market risk measurement and reporting, presentation to risk committee, and performance monitoring / loan modification management.

Expertise

Key Skills

- Portfolio Management
- Risk Management
- Balance Sheet Optimization
- Fundamentals Research
- Analysis & Strategy
- Digital Asset Trading
- Underwriting
- Loan Structuring
- Hedge Funds
- Margin Trading Agreements
- Global Funding
- Lending Strategy
- Due Diligence
- Analytical Skills
- Critical Thinking
- Problem Solving
- Presentation Skills
- Communication Skills