

Curriculum Vitae

Claudia Pitterle

Diplom Betriebswirtin (FH)

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Work Experience

01/2016- present Certified Financial Planner® (CFP), European Financial Advisor (€FPA)
Creation of customer-specific financial plans according to the professional rules of the Financial Planning Standard Boards e.V.

07/2000- present Senior Financial Consultant
MLP Finanzberatung SE, Oberanger 28, 80331 Munich, Germany
Investment advisor in accordance with section 2 (10) KWG under the liability umbrella of the MLP Finanzberatung SE, Munich, Germany
Registered as a financial broker with permission §§34c, 34d Abs. 1 GewO
Register number: D-WFGA-0XJW9-39, Munich, Germany
Registered as a real estate loan broker with permission §34i Abs. 1 GewO
Register number: D-W-155-RR85-17, Munich, Germany

☐ Holistic independent advice and financial planning in the areas of wealth management, pension management privately and operationally, health insurance, risk management and real estate financing including sales

☐ Strategic wealth planning for distinguished private clients cash-flow- and risk analyses, status quo forecast, scenarioanalyse, target-performance

☐ Today 180 academics / private customers and their families

Advanced Training

02/2020-05/2020 Training as an executor of a will according to the rules of AGT, (Arbeitsgemeinschaft der Testamentsvollstreckung und Vermögenssorge e.V.) in cooperation with JURA DIREKT, Nuremberg, Germany

11/2016 Licence to create of patient decree, precautionary mandate, legal guardianship and custody order for children in cooperation with JURA DIREKT, Nuremberg, Germany

10/2013-01/2016 Training to a Certified Financial Planner® and examed Financial Planner according to DIN ISO 22222 at Corporate University MLP, Germany and Frankfurt School of Finance, Frankfurt on the Main, Germany

10/2013 Training to a Financial Planner [+] at Corporate University MLP, Wiesloch, Germany

07/2000 In-house MLP licenses
Education Retirement Planner (CU), generation planning, closed-end equity funds and closedend mutual AIF, Real Estate, Asset Management I/II, Occupational Provisions I/II, Financial Repots

10/2020- present University Alexandru Ioan Cuza din Iasi, Romania
Doctoral School of Economics and Business Administration
PhD Student
Dissertation Topic:” Consumer Behaviour and decision- making from office-based doctors- an analysis about the professional safeguarding risks”

04/1996 - University of Business and Society, Ludwigshafen, Germany
04/2000 Human Resources and Training
Graduation: Diplom Betriebswirtin (FH)
Topic:” Inventory and Optimization of a Total Quality Management Project at Sparda Bank Hessen eG “(formerly Sparda - Bank Kassel eG), Kassel, Germany

04/1995 - Business Administration, University of Mannheim, Germany
03/1996

Special Skills

Member of Financial Planning Standard Boards (FPSB) Germany e.V.

Computer Skills
MS Office
Outlook

Language
German native speaker English fluent
knowledge (oral and written)

Publications

Biases in the German Stock Market Lead to Losses in Returns for Investors! An Overview of The German Investor Culture from the Perspective of Behavioral Economics.

<http://ijmas.iraj.in/>.

[https://ijmas.iraj.in/paper_detail.php?paper_id=18642&name=Biases in the German Stock Market Lead to Losses in Returns for Investors! An Overview of The German Investor Culture from the Perspective of Behavioral Economics](https://ijmas.iraj.in/paper_detail.php?paper_id=18642&name=Biases_in_the_German_Stock_Market_Lead_to_Losses_in_Returns_for_Investors!_An_Overview_of_The_German_Investor_Culture_from_the_Perspective_of_Behavioral_Economics)

Published on 21/07/2022, International Journal of Management and Applied Science (IJMAS), pp. 40-42, Volume-8, Issue-4

How do Doctors Evaluate Insurance for Their Surgery and What Decisions Are Made for or Against Taking out Insurance? International Journal of Management and Humanities (IJMH). <https://www.ijmh.org/portfolio-item/g1249035721/>

Published on 30/03/2021, International Journal of Management and Humanities (IJMH), pp.

9-15, Volume-5 Issue-7, Retrieval Number: 100.1/ijmh.G1249035721,
DOI: [10.35940/ijmh.G1249.035721](https://doi.org/10.35940/ijmh.G1249.035721)

Consumer Behavior and Decision Making from Officed-based Doctors.
A Systematic Literature Review
<http://www.scholink.org/ojs/index.php/jepf/article/view/4522>

Published 2022, Journal of Economics and Public Finance, Vol 8, No 1 (2022) DOI:
<https://doi.org/10.22158/jepf.v8n1p35>

Pitterle, C. (2022c). *VOLUME XXIV (2022) | Issues: HOME-MARKET BIAS! INVESTMENT BEHAVIOR FROM THE PERSEPECTIVE OF BEHAVIORAL ECONOMICS IN THE GERMAN STOCK MARKET*. <https://cmj.seaopenresearch.eu/index>.
<https://cmj.seaopenresearch.eu/volume-xxiv>

Published on 20/12/2022, Cross Cultural Management Journal, pp.143-148

Presentations

“What do cyber-attacks and pandemics have in common? Some lessons from the German medical practices behaviour”

38th IBIMA international conference, 23-24- November 2021, Seville Spain,
ISBN: 978-0-9998551-6-4 and ISSN:2767-9640

[38th IBIMA Conference | International Business Information Management Association \(IBIMA\)](#)

“Climate Change, Natural Disasters 2021 And the Impact on Insurance Demand! A Look at Germany from The Perspective of Behavioral Economics”

39th IBIMA Conference on 30-31 May 2022 Granada, Spain.
ISBN: 978-0-9998551-8-8 and ISSN: 2767-9640

[39th IBIMA Conference | IBIMA](#)

“Biases in the German stock marked lead to losses in returns for investors! An overview of the German investor culture from the perspective of Behavioral Economics”

Paper ID: SG-BMSS-BELN-040322-1052

International conference on Language, Innovation, Culture and Education (ICLICE) Berlin, Germany
on 4th March 2022, Science Globe <http://scienceglobe.org/Conference/8412/ICLICE/>

Additional publications online, journals and newsletter

Cyberbedrohung in Deutschland – Was tun Sie für Ihr Unternehmen oder Ihre Kanzlei? – FRÜHER PLANEN. www.frueher-planen.de/. <https://www.frueher-planen.de/cyberbedrohung-in-deutschland-was-tun-sie-fuer-ihr-unternehmen-oderihre-kanzlei/>

Raus aus der Bias – für bessere Finanzentscheidungen – FRÜHER PLANEN.
www.frueherplanen.de/. <https://www.frueher-planen.de/raus-aus-der-bias-wie-kunden-finanziellbesser-entscheiden/>

Beste Strategie für mehr Vermögen Wie Kunden finanziell richtig entscheiden. DAS INVESTMENT. <https://www.dasinvestment.com/wie-kunden-finanziell-richtigentscheiden/>

Newsletters - brunwiksociety.org: Insurance Decisions of Doctors in Private Practice in Germany: Dissertation Research Status and Approach. brunwiksociety.org.
<https://brunwiksociety.org/newsletters/>

Cyberbedrohung in Deutschland: Wie können Sie Ihr Unternehmen oder Ihre Kanzlei schützen? *PortfolioJournal*.
https://assets.portfoliojournal.de/portfoliojournal/archiv/2023/Portfolio_Journal_2023_05.pdf

Raus aus dem Bias- Wie Kunden finanziell besser entscheiden. *PortfolioJournal*.
https://assets.portfoliojournal.de/portfoliojournal/archiv/2023/Portfolio_Journal_2023_02.pdf

Claudia Riese