From childhood dreams to finance – professionals on their career path

Asset management wasn't always part of the plan.

"When I grow up, I want to work in finance…" – probably not what most of us said as children. And for the professionals featured here, it certainly wasn't the plan.

Their childhood ambitions took them in very different directions – from dance and music to medicine, engineering, and entrepreneurship. Yet, somewhere along the way, finance found them.

Bernice Liu

Investment Analyst,
Unio Wealth Management

Finding Patterns in Music, Movement, and Markets

If someone had asked me as a child what I wanted to be when I grew up, "fund selector" would certainly not have been my answer. **My world back then revolved around dance studios, music lessons, and schoolbooks.** Yet, looking back, the foundations of my career in finance were already being built, even if I did not realize it at the time.

From a young age, I was naturally drawn to numbers and details. I enjoyed spotting patterns, solving problems, and understanding how things fit together. Alongside this, I spent years learning two passions that became a huge part of my childhood: dance and the guzheng, a traditional Chinese string instrument.

At first glance, neither seems connected to finance. However, both taught me lessons that I still use today. Dance requires discipline, precision, and consistency. Every movement must be carefully controlled, yet flow naturally within a larger performance. Playing the guzheng demands patience, concentration, and an ability to recognize patterns within complex pieces of music. **Hours of practice taught me that excellence is often the result of countless small improvements made over time.**

In many ways, finance is not so different. **Successful investing is rarely about dramatic decisions. It is about paying attention to details, identifying patterns, staying disciplined, and making thoughtful judgments based on the information available.** The habits I developed through music and dance helped train both my focus and my ability to think systematically.

These passions naturally influenced my academic choices. In high school, students in China choose between two educational tracks: Wen Ke (Humanities) and Li Ke (Science). For me, choosing the science track was an easy decision. Immersing myself in mathematics and physics sharpened my analytical mindset and strengthened my problem solving skills, qualities that play an important role in my career today.

By the time I entered university, I knew I wanted a career that combined analytical thinking with real-world impact. **Finance immediately stood out.** Studying finance introduced me to a fascinating world where numbers tell stories and data drives decision making. To broaden my perspective, I later moved to Ireland to pursue a Master's degree in Finance. Beyond the academic challenge, the experience exposed me to diverse cultures, viewpoints, and ways of thinking, deepening my understanding of global financial markets and shaping me both professionally and personally.

Today, I work as a Fund Selector at Unio in Ireland, evaluating investment managers, analysing market trends, and identifying strategies that can deliver value for clients. When I reflect on my journey, it may seem like an unusual path from dance, music, and science to investment management, but the common thread has always been a fascination with patterns, whether in a musical composition, a dance routine, a physics equation, or a financial portfolio…

Dirk Fischer

Managing Director Patriarch Multi-Manager, GmbH

I come from a working-class family. During my childhood, we were fortunate in many ways, but money was always limited. **As a result, one of my lifelong dreams has been to make financial freedom accessible to everyone.** It was an inspiring goal, but in my younger years it felt almost impossible and far beyond reach.

I began pursuing this passion by becoming a bank clerk, specializing in Private Wealth Management. It was a solid foundation for my own financial development, but I kept asking myself: **what did this mean for my vision of helping as many people as possible?** Over time, I realized that the stock market offers one of the best opportunities to build long-term wealth, and that investment funds are an ideal instrument for enabling people to participate in this growth. Through my role at the bank, I was able to help many clients build a much stronger financial foundation.

But it wasn't perfect. I couldn't act independently or freely select the best solution from the full range of available investment options. Too often, I had to compromise on costs, management quality, or flexibility.

I knew there had to be a better way.

Twenty years ago, I had the opportunity to take the next step by leading Patriarch Multi Manager GmbH, an independent fund company, where I began developing successful and innovative investment solutions. At last, I was able to combine everything I had learned with the expertise of outstanding external specialists to create the very best products we could imagine for our clients.

Since then, many of our clients have moved significantly closer to achieving their own financial freedom with our support and the investment solutions we have developed. **It is the realization of the vision I had as a child. And I can honestly say that I am incredibly proud to see so many clients turn their dreams into reality with our help.** It is a true privilege and an honor to have this opportunity every single day.

Mission accomplished!

Or, as Walt Disney once said: "If you can dream it, you can do it".

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Mark Dainty

Lead Portfolio Manager, BlueBox Asset Management

I vividly remember my mother taking a painkiller for a headache. This was the moment I needed to understand how medicine works inside the body in detail.

Around the same time I had discovered Chemistry at school and enjoyed this molecular understanding of how our world works. **All of this took me to study Pharmacy at University, but after a short work experience, I realised I did not want to be a Pharmacist.**

I'd decided a career in business seemed like fun because through this time, I had an underlying interest in business and the stock market. I was always intrigued by the newspaper pages with share prices and P/E ratios that were like another language to me, at that time.

With no business knowledge, I decided the most efficient way to learn was to become a Chartered Accountant. Those three years were instrumental in understanding a business quickly, seeing how financial reporting works, information is put together and where the uncertainties lie.

The leap to becoming a sell-side analyst was the result of a conversation with an entrepreneur in the investment world, Richard Mein, the founder of Parmenion in the UK. He suggested I become an analyst covering Pharmaceuticals as a good way to combine my experience. **So, at the end of my training with KPMG, I joined the European Pharmaceuticals research team at Citi.**

I learnt a great deal but discovered that the sell-side is not necessarily about being a successful investor, so started exploring a move to the buyside. This led me to Blackrock in London where I worked with the BlueBox co-founder, William de Gale.

At Blackrock I discovered the power of Precision Medicine, a technology and theme that had been emerging for over 20 years. In my studies it was worthy of less than half of one lecture. But around 2015 I started to understand its impact on investment outcomes as it became a big driver of Astrazeneca's successful turnaround, as well as driving returns in other biotechnology firms.

Managing a fund had become my next goal but I knew I needed portfolio management experience so jumped at the chance to become a biotechnology Portfolio Manager at Norges Bank Investment Management and put Precision Medicine as an investment thesis into practice. **This time also taught me many lessons about being long-term, sticking to conviction, scaling investments and interviewing management teams.**

Finally a great opportunity to work with the team at BlueBox and launch the BlueBox Precision Fund appeared. The idea of launching a fund had always been in the back of my mind but after a short conversation with William, doing it on my own didn't seem feasible. The opportunity to design a strategy investing in Precision Medicine, work with trusted people and take the entrepreneurial leap was too good to pass up, even if it was nerve wracking in the beginning.

Heloïse Greeff

Pro Investor,
Etoro

I didn't grow up dreaming of markets. I grew up wanting to build things and solve problems. However, as it turns out, that is exactly what investing lets me do.

My first finance lesson came from my mum. Growing up in South Africa, **I received pocket money only when I submitted a monthly budget and an expense spreadsheet.** I quickly worked out that if I budgeted carefully and spent sparingly, I could redirect what was left into something better. Part of that game meant mutual funds. Growing up against a backdrop of double-digit inflation, the future value of money was always part of the conversation.

Maths was my favourite subject, so I studied Mechatronics Engineering at the University of Cape Town. That led to a Rhodes Scholarship at Oxford, where I completed an MBA and a PhD, and to co-inventing two patents for AI systems that remotely monitor patients in 2013. **My instinct has always been the same: use technology to help more people.**

Investing found me at Oxford. My MBA classmates were buying stocks from their phones, and I thought: if they can do this, so can I. True to form, it took me a year and a spreadsheet comparing every UK platform before I opened an account. **In 2016 I started with $300 and a handful of fractional shares. I made plenty of mistakes early on,** especially commodities taught me the difference between trading and investing. Thankfully, I quickly turned to the tech and healthcare sectors I understood.

Today I am one of etoro's most copied Pro Investors, with thousands of people worldwide copying a portfolio I run using AI-driven strategies I built and have refined over more than ten years. Being accountable to those investors has made me a far better one as I must communicate every decision clearly and calmly to 250k followers.

But the part that matters most to me is access. **I see investing as a route to genuine equality.** I want others to have the decision-making power it has given me, especially women. My advice is always the same: start small, take it seriously, and automate it. The barrier is far lower than people think.

I didn't set out for a career in finance. But the eight-year-old with the spreadsheet would, I think, be rather pleased.

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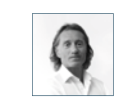

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