

**Beatriz Morilla**

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Career mission statement:

Keep learning to become a sought-after leader to inspire and run sustainability financial sector's strategies and goals in the financial and non financial sector, based on the skills and experience acquired over the last 25 years.

Employment History

Spanish Banking Association

May 2015-Present

Head of CSR

My responsibility involves creating a centre of excellence that will direct, catalyse, inspire and support the evolution and delivery of a Spanish financial sector CSR strategy; an agenda that not only will help play a key role in rebuilding, protecting and enhancing our reputation, but will help the sector to assume the vital role we represent on building a sustainable future to meet the needs of society.

Our main focus areas for 2016-2018 are sustainable finance, conduct and financial education

Barclays EMEA

December 2011-April 2015

Head of Citizenship EMEA

Reporting directly to the CEO, my role involved and delivery of the Citizenship strategy set by the Group. To deliver on this aspiration, I am responsible of the governance, integration and delivery of the Europe Citizenship plan within the following areas:

How we do business:

- Embed the "Citizenship lens" in culture and business, being a member of the following Committees: New Products Approval, Investment, Repossessed assets. Our aspiration is to spread this tool within the organisation as a making decision mechanism to ensure we include all our stakeholders in the process.
- Represent Europe in all Group Citizenship workstreams (i.e. Ambition 2020, whose purpose is to incorporate the "how" in the group's medium and long term strategy)
- Ensure Barclays Europe meets the minimum regulatory and group's standard targets on environment, D&I and sourcing

How we contribute to growth:

- Proactively work together with the Head of Business Development and Customer Insight, developing SCR aligned products/services by supporting and monitoring the creation of the agreed number of new initiatives in Europe.

- Engage with the Head of Risk and Business Development to detect opportunities to become “the patient capital” in those businesses with social impact in the communities where we are present.
- Work together with the Head of IT and the Head of On-line Banking, Developing Universal Access Projects for achieving the objectives of the Citizenship strategy (physical and cognitive full accessibility by 2020)
- Engage the Legal, compliance and regulatory departments to build up a “transparent and Plain English” culture in all our products and communications to clients.
- Engage colleagues, suppliers, and other financial institutions to Lead Financial education programs; sharing our “Money Skills” learning material to improve financial education levels in all the communities where we are present.

Support our Community :

- My role involved leading the Europe Community Investment (CI) function in Portugal, Spain, Switzerland, Russia, Monaco, Israel, UAE, Germany and Check Republic, ensuring strong alignment with global strategies and priorities while making sure that regional priorities are represented. A key responsibility is to ensure a shift from a reactive philanthropic activity in the region to a shared value investment strategy, promoting a culture across the region of professionalism and dialogue.
- I also provide stakeholder support in all countries across the region and ensure effective and efficient delivery of investments in all countries across the region, working closely with the local Community Investment Head, to provide programme management and employee engagement to ensure we achieve our iconic goal of “5 million Young Futures” (5 m of disadvantaged people under 35 finding a job by the need of 2015), improving the levels of skill based volunteering. In Spain, despite the difficult situation of the business, we reached a 43% ratio of colleagues engaged in volunteering activities.

Barclays Spain

Head of Tax
Madrid; Spain

Mid 2004 – December 2011

I had the responsibility for main direct and indirect taxes covering operations of the different lines of the Group business in Spain: Retail Banking, Corporate, Wealth, Asset Management and Investment Banking.

Main three areas of responsibility:

- **Tax management:** maintenance of good relations with the Spanish Tax authorities, responsibility for the tax position in the financial statements, tax reporting to the Group and budgeting; ensuring transparency, accurateness, and adequate level of internal control and documentation; generating profit through the adequate tax saving strategies.
- **Tax support to the business:** projects co-owned with Supply Chain Operations (i.e. establishing a good reporting of client's tax information to the Spanish Tax authorities, with Commercial Operations (i.e. launch of new products), with Finance & Treasury (i.e. potential acquisitions and finance projects) and with Holdings & Administrations (i.e. internal legal restructurings).

PricewaterhouseCoopers

International Senior Tax Manager
London; UK

2003-2004

Main responsibilities: Advice on international MNC's direct and indirect investment in Spanish companies, cross-border acquisitions, disposals, and all type of restructuring involving Spanish companies. Development and tax due diligence for the European market on various project finance structures jointly with PwC London Project Finance Team

PricewaterhouseCoopers

Senior Tax Manager for multi-jurisdictional products
Global Financial Products Group
London; UK

2001-2003

Main Responsibilities:

- Structuring and development of cross border tax based financing, investment and derivative products pertaining to the Spanish and Italian jurisdictions.
- Development and marketing of financing and corporate finance strategies for GFPG as well as jointly with investment banks

PricewaterhouseCoopers

Tax Manager for multi-jurisdictional products
Investment management Group
London, UK

1998-2001

Major clients in UK include JP Morgan IM, Barclays Global Investors, Lend lease, UBS

PricewaterhouseCoopers

Tax Manager for multi-jurisdictional products
Financial Services
Madrid, Spain

1995-1998

Major clients in Spain include Banco Popular, Barclays; Credit Lyonnais; BBVA

PricewaterhouseCoopers

Senior Auditor
Madrid, Spain

1992-1995

Education & Professional Qualifications

2017 Transparency and Corporate Governance expert
International Transparency, Madrid, Spain

1998 Master in Spanish Tax Law
Centro de Estudios Financieros, Madrid, Spain

1991-1992 Diploma in Accounting
Centro de Estudios Financieros, Madrid, Spain

1992 Law Degree
Universidad San Pablo CEU – Madrid, Spain

Languages

English: fluent, **Italian:** Fluent; **French:** advanced, **Spanish:** native.