

OSIF ALUMNI CONVERSATIONS

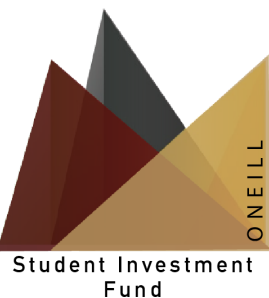
with **Jackson Lewis** -
Columbia Trust - Investment Analyst



How would you describe this course to a friend?

I'd say we were tasked with managing a portfolio of various sizes. We met once a week to decide the best course of action and a lot of dialogue and guided discussion. Especially with Ernesto, you learn to pay attention to what's driving the markets.

With Chris he would buy us food sometimes and earned major points.



How did this course's layout enrich your overall education experience?

Well I think having professors that work outside of academia was beneficial. Several other professors had worked in the private sector beforehand but to have Chris, Ernesto, and Alex to say this is how we do it currently. I think added a lot to the academic experience. Also, I think it was cool to see how your decisions actually played out. To have something to look forward to daily or weekly, like how are our stocks and ETFs (exchange traded funds) doing. You feel pretty involved in the funds because of the course layout.

"To be able to say I've been part of investment decisions in this way made a difference. I had someone tell me at my job, don't discount that."

What's the biggest takeaway you got from this course?

You need to be involved with the fund and involved in your education. A lot of people in investments go out of their way to find information and to figure out what it means. The people that did well in OSIF were the people who took the time to know what they were talking about and it was obvious when you didn't. That helped me learn if I'm going to be in this world, it's going to take involvement on a pretty consistent basis.

The professors in the OSIF class are your allies for not only during the class but afterwards too. Ernesto passed my resume along when I asked him to. Chris, I talked to him several times about career trajectory.

Who is your financial investor idol?

I don't really know if I have one? I think Mike (Michael) Burry is up there. I say Burry because he beat everybody by working harder. He just read materials that were available to everyone but then he actually read them. I like him for his work ethic.

How did this course help prepare you for your current role?

A lot of people that I have talked to that have taken OSIF went into corporate finance and it's cool to have taken that course and be in the role of asset management. It prepared me really well because of the conversations we had. The conversations I had then are similar to what I do now.

I learned it's important to have an investment thesis and a detailed one. When we made buys or sells in OSIF it was super rigorous but we would get asked 'why do you want to buy Nike?' Then we would go into detail. One other thing that was cool about OSIF, is in the application process people respected the fact that I have done a student investment fund because it's not common to hear. To be able to say I've been part of investment decisions in this way made a difference. I had someone tell me at my job, don't discount that.