

OSIF ALUMNI CONVERSATIONS

with **Katherine A. Porras** -
Meyer Memorial Trust Investment Officer



Who is your financial investor idol?

There are two ladies that I do enjoy listening to, Melody Hobson and Carla Harris. It's sort of their other persona outside of their financial world that makes them so appealing to me. Having had a dance background always looking at people for the other gifts and how they are able to connect those two things together. They may seem separate but how they're able to bring them together. That's what draws me to them. Always looking at people for the gifts and how they are able to bring those gifts to their work and converge things into their work.

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

Definitely that's one thing that I knew I could see the connections and how the classes were linked. Not only in the material but also the timing of when the material was covered. The materials covered in the OSIF program felt very synchronized to other courses and reinforced in the core classes such as, finance, statistics, and finance. This ultimately helped us gain different perspectives and helped us during the learning process. With this particular course, it was more of a combination, it required you to know a lot of the building foundation blocks and you already gathered from the previous year and by the time you got to this class you were just applying things you already learned and how to make it into an influential argument.

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

Immediately I'm thinking "Buy low, sell high" *joke* I would say understanding 'your' tolerance for risk that could be your personal, or if you're working for an institution or clients (other individuals) it could be calculating their tolerance for risk. The 'your' can be applied in different ways but understanding what that risk is for ourselves and of course, there is the risk of the actual balancing of the portfolio when you make moves on certain asset holdings but there's also risk with a client or the institution you want to work with. The risk of how do you manage your own professional persona within the office versus outside of the office. The risk not just within the portfolio but in real life and I don't think one is necessarily absent from the other. Meaning the appetite for the risk I have in my personal life has some resonance with the risks I'm willing and able to take within professional life. I think they are connected in many ways.

How related is this course to your everyday work?

For my everyday work, I think it is, where I'm currently at I do not necessarily analyze and evaluate individual stocks however I think the training we got to analyze the things that you look for and how to condense and make that presentation in a concise manner and also how to present it and share with upper management and boards. All of that I thought was very relatable and insightful. The fact that we got so much training in those areas made it easy for me to come into my current company and certainly each organization has its way of doing things. But the key ways of how to analyze a problem or a situation and how to present a recommendation and have the confidence to come out with a recommendation and stand with that. I think that is something that is definitely relatable and something we got a lot of training in.

"This may be your last opportunity to make sure you get the full understanding of investments and have a safe space where you can work it out now in practice and I think that's a priceless experience. Does it require work? Sure, it does, nothing comes for free, but it's worth the effort."

