

OSIF ALUMNI CONVERSATIONS

with **Elizabeth Hartman**- Intel, Senior Analyst



Who is your financial investor idol?

Warren Buffet especially during COVID I feel like he's been really steady with his investment strategy and I think that's pretty admirable.

I feel like the best way you can learn is by being able to make those mistakes in the classroom, it's an invaluable experience.

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

I think it helped prepare me to look at the three different investment strategies. It taught me to think really well. If there's a problem or as you bring in new information together, making sure you look at it from all different angles I think it has helped me the most in my current job.

Alex Russel, he has a very qualitative approach and Chris combines those approaches qualitative and quantitative and has the most balance. Ernesto is very feelings-based like he goes with his gut a lot. But that's just my take on it. I think it's good to learn all three perspectives and I think you learn a lot about your risk tolerance and what you're willing to compromise on or not. It's the perfect environment to do that because it's not your money but at the same time, you have to answer to the board and that is stressful as well because you want to make sure you're not losing the university money.

You learn a lot of governance within the class, it's not only investments but it's also about how are we going to get people on board to make this investment? That is invaluable like getting stakeholder buy-in, I use that every single day in my job.

How related is this course to your everyday work?

I think the methodology, thinking, and theory is relatable and it's certainly an area that I'm in a finance rotational program so eventually, I could have the opportunity to work with financial relations on behalf of Intel which is something I would eventually love to do. I think in different ways I use some of the teachings from the class even though I'm technically not a financial advisor.

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

I feel like I'm a much more informed investor and that's huge. I feel really confident in managing my own portfolio and that kind of empowerment is powerful. The learning shouldn't stop with the class and that's what I like about it, it's ongoing with a great community of people that we can talk about strategies with and I think that's the whole point of doing this right now because it's all about lifelong learning with a community. Especially when things like this come up like COVID, no one could have predicted this in any of their investment models and so it's really nice to have a community of people you can come together with and talk through what to do.

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

It really supplemented my classes nicely, I could bring the strategies from OSIF into my other classes. That methodology of thinking helped me in my other classes.

How would you describe this course to a friend?

Essentially you get about \$500,000 you are charged with allocating that money into a portfolio and you are the steward of that portfolio with you and your classmates. You constantly have to be updating the portfolio and communicating with one another on what you should be doing. That's more of the experiential part of the class. More of the educational component is learning different models and more of the theory behind investments so when you are executing your strategies in the experiential part of the course you have something to back you up.

