



Michael McMillan, Jamie Jackson, Chris Kerker and David Krause

Marquette University's AIM Program Hosts Three Investment Professionals on Monday, March 20, 2017

Monday, March 20, 2017, was a busy day in the AIM program. Dr. David Krause, AIM program director, welcomed three guests to Marquette.

Dr. David Krause, AIM program director, said, "It is a pleasure to host Jamie Jackson, CFA, a Managing Principal of Stairway Partners, LLC (located in Chicago and Minneapolis).

A Marquette alumnus, Mr. Jackson had a lively presentation with the students in the AIM Class of 2017. It was a pleasure hosting him for the morning."

STAIRWAY PARTNERS

Stairway Partners is an SEC-registered Investment Advisor founded in 2004 by former senior investment professionals from Brinson Partners, a US-based institutional asset management firm which was widely known for its pioneering work in the field of asset allocation and global investing. Their investment process is supported by extensive research and is grounded in the principal belief that the overwhelming majority of a portfolio's risk and return is determined by its asset class mix – not the selection of individual investments.

Stairway Partners was originally formed to provide the firm's partners and their investment colleagues with an institutional platform for managing their personal assets. As a result of the firm's reputation and track record, Stairway Partners has since become a sought after solution for other experienced investors seeking a low-cost, comprehensive institutional investment capability.

Jamie Jackson is responsible for investment research, strategy, portfolio management, and trading. Previously Jamie was head of Liquid Assets at Ameriprise Financial, responsible for over \$100 billion of client assets. Jamie served on the firm's Capital Markets Committee, led the Liability Driven Investment team, and managed numerous fixed income, balanced, and equity indexed mutual funds.



Prior to that, Jamie managed institutional portfolios and mutual funds for UBS Global Asset Management and Brinson Partners, its predecessor organization, where he also served on the Global Asset Allocation Committee. Before joining Brinson Partners, Jamie managed global bond and currency portfolios for the Northwestern Mutual Life Insurance Company. Jamie has over 20 years of investment experience, holds BS and MBA degrees from Marquette University, and is a CFA charter holder.



Michael McMillan, CFA, the CFA Institute's Director of Ethics and Professional Standards, spoke to students in the AIM Class of



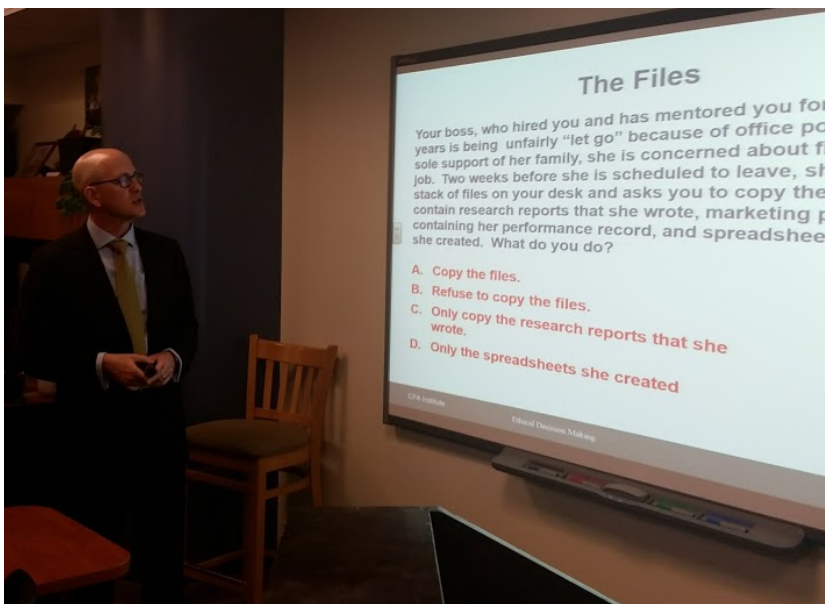
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2018. He holds a Ph.D. in Accounting and Finance from George Washington University – he also received his MBA from Stanford University and his BA from the University of Pennsylvania.

Joining him in talking about investment ethics was **Chris Merker, CFA**, Director of Private Asset Management with Robert W. Baird & Co. Mr. Merker teaches Investment Ethics in Marquette's AIM program. Working with Dr. McMillan, Chris Merker is completing a CFA Ethics 'Train the Trainer Program' and will receive the CFA Institute's Certificate in Ethics Training. Incidentally, he will receive his doctorate from Marquette University in May 2017.

Dr. McMillan is the author of the CFA's Ethics and Standards of Practice course. The CFA's 'train the trainer' is a strategic element in the CFA's response to meeting the demand for ethics training. We are pleased to host Michael and Chris to Marquette University.

Dr. David Krause, AIM program director, said, "It was again an honor to host Michael again at Marquette. I'm very pleased that Chris Merker is continuing to expand his expertise in the area of investment ethics. The two did a great job with their presentation."



Chris Merker in a CFA 'Train the Trainer' Session
at Marquette University



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