



Jamie Jackson of Stairway Partners with students in the Investment Club

Jamie Jackson of Stairway Partners met with student managers of the Investment Club on Tuesday, 4/25/2017

On Tuesday, April 25, 2017, **Jamie Jackson** of **Stairway Partners** visited Marquette and met with students involved with the Investment Club. Mr. Jackson, CFA is a Managing Partner with the St. Paul and Chicago-based investment firm. He is responsible for investment research, strategy, portfolio management, and trading – and he has over 20 years of investment experience. Mr. Jackson holds BS and MBA degrees from Marquette University and is increasing his involvement with the AIM program.

He talked with the student managers of the Investment Club about Stairway Partners' investment philosophy which is grounded in the fundamental belief that the overwhelming majority of a portfolios' risk and return is determined by its asset class mix – not by the selection of individual investments. This approach of using ETFs and index funds is similar to the approach used by the Investment Club.

The concept of asset allocation drives their clients' investment policy and long-term asset allocation strategies allowing for portfolios that properly reflect risk, return and cash flow requirements.

Dr. Krause, AIM program director said, "The Marquette students found the discussion useful and helped provide them with a

framework for setting long-term risk and return expectations – and provided with an appreciation of how to manage through times of market turmoil (i.e. Financial Crisis of 2008)."

Dr. Krause added, "It was a treat for Jamie Jackson to meet with the students. His experiences in the industry and explanation of Stairway Partners' investment philosophy and process was valuable for the students to hear. The students in the Investment Club look forward to meeting with Mr. Jackson during the fall semester."

The **AIM Program** at Marquette University began in 2005. Since then over 400 undergraduate students have participated in the program. Our alumni can be found in leading asset managers and investment banks throughout the country - and the world. As the first undergraduate program partner with the CFA Institute, we take pride in our students' successful placements and CFA exam pass rates. In 2014 we added our second track: Private Equity & Investment Banking. Please feel free to contact us at: aim@marquette.edu



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