



## LEADERSHIP PROFILE

Carl Jackson is a Senior Investment Analyst with Oxford Financial Group, Ltd. In this role he is responsible for due diligence, execution and management of both investment managers and direct private investments. His expertise includes alternative investments, valuation, quantitative and financial analysis.

Before joining Oxford, Carl served as Senior Investment Analyst at the Indiana Public Retirement System. Carl led diligence on nearly \$400 million of private

### CARL S. JACKSON, MBA, CFA SENIOR INVESTMENT ANALYST



*“Success in alternative asset classes requires an exemplary team, proven process and a long-term perspective. Oxford’s independence, history and sophistication allows the investment team to pursue the best ideas across a range of private market asset classes and strategies to help our clients achieve their long-term financial aspirations.”*

equity commitments each year. He also led the planning and execution of the \$32 billion defined benefit pension plan’s entry into private markets in Asia.

A graduate of Purdue University, Carl holds a Bachelor of Science degree in Economics with a minor in Philosophy. Carl earned his MBA with a concentration in Finance from Indiana University. He is a holder of the Chartered Financial Analyst® designation (CFA® charterholder).

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