LEADERSHIP PROFILE

CARL S. JACKSON, MBA, CFA
DIRECTOR

"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."

Carl Jackson is a Director within the Investment Management Group for Oxford Financial Group, Ltd. In this role, he is responsible for sourcing, due diligence, execution and management of fund, co-investment and direct private investments. Carl is a voting member of the Regent Street and Co-Investment Sub-Committees and a member of the Mayfair Capital Partners™ team. His expertise includes alternative investments, quantitative analysis and legal documentation.

Before joining Oxford, Carl served as Senior Investment Analyst at the Indiana Public Retirement System. Carl led investment and operational due diligence on $300 million of commitments annually and closed six fund investments over three years. He also led the strategic 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 master of business administration (MBA) with a concentration in finance from Indiana University where he was the winner of both the Peterson and Cox fellowships for excellence in finance as well as the Todd B. Richter investment award. He is a holder of the Chartered Financial Analyst® designation (CFA® charterholder). Carl is also a member of the Institutional Limited Partners Association.

The Master of Business Administration (MBA) is a graduate level degree providing theoretical and practical training for business or investment management. Chartered Financial Analysts® (CFA®) are licensed by the CFA® Institute to use the CFA® mark. CFA® certification requirements: hold a bachelor's degree from an accredited institution or have equivalent education or work experience, successful completion of all three exam levels of the CFA® Program, have 48 months of acceptable professional work experience in the investment decision-making process and fulfill society requirements, which vary by society. Unless you are upgrading from affiliate membership, all societies require two sponsor statements as part of each application; these are submitted online by your sponsors.
OFG-2301-6