

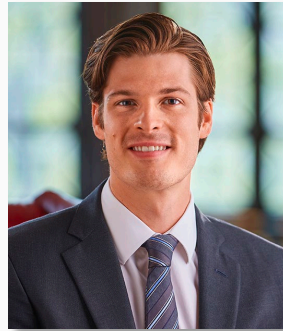


LEADERSHIP PROFILE

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).

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-2107-7