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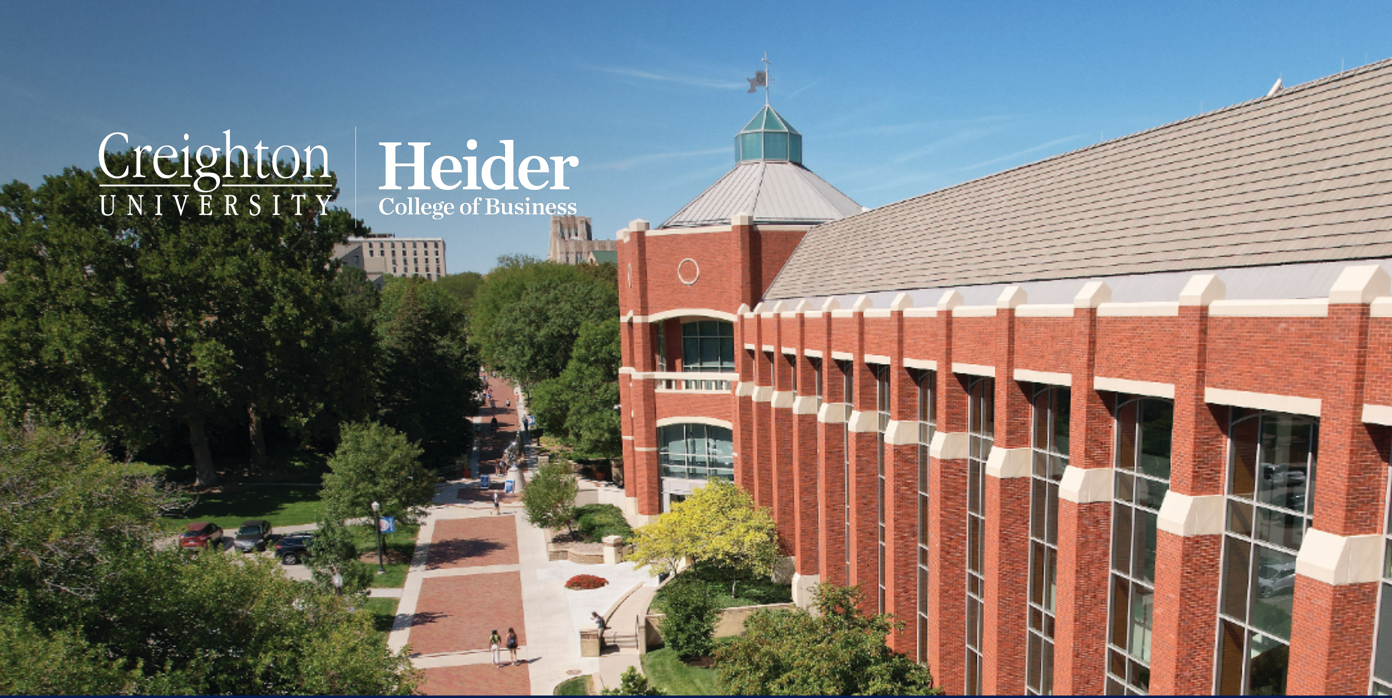

13TH ANNUAL

Value Investing Panel

Presented by the Heider College of Business Portfolio Practicum class

The Portfolio Practicum class is an experiential learning opportunity unique to the Heider College of Business. Students learn portfolio management techniques and augment classroom lessons on valuation skills while gaining real-world investment practice. This year's class invested more than $10 million of the University's endowment.

Our History

Currently in its 13th year, the Value Investing Panel (VIP) is organized and run by students in the Portfolio Practicum course and is designed for individuals interested in value investing.

The event is open to members of the community who would like to hear panelists' thoughts on various investment strategies and the current state of the stock market. Picking the brain of just one of the panelists would be illuminating; hearing their combined thoughts in a panel discussion atmosphere offers a rare opportunity.


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Faculty

Randy Jorgenson, PhD, CFA
Professor of Finance, Department of Economics and Finance

Michael L. Green, MBA
Portfolio Practicum Instructor
President & Owner, Evergreen Capital Management

Portfolio Practicum Class

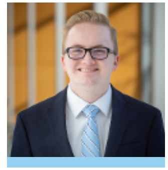
Katie Allen
Phoenix, Arizona

Emma Cox
Roseville, Minnesota

Spencer Dunckley
Beaverton, Oregon

Juan Carlos Fernandez Wohler
Mexico City, Mexico

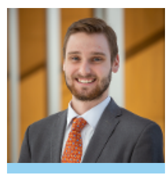
Riley Gill
Portland, Oregon



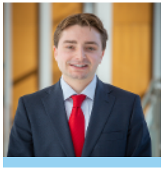
Cole Goeltl
Fort Collins, Colorado

Maggie Harens
Edina, Minnesota

Tristan Houk
Pensacola, Florida



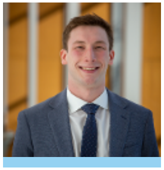
Evan Hughes
Scottsbluff, Nebraska



Joseph Joas
Edina, Minnesota

Cole Sheridan
Shawnee, Kansas

Henry Lewis
Omaha, Nebraska



James Steichen
Tulsa, Oklahoma

Colin McCabe
Chicago, Illinois

Jackson Strombeck
Hartland, Wisconsin

Daniel Ralls
San Mateo, California

Evan Weerts
Carmel, Indiana

Moderators

Robert R. Johnson, PhD, CFA, CAIA

Professor, Heider College of Business
Founder, Chairman and CEO, Economic Index Associates

Robert "Bob" Johnson, PhD, CFA®, CAIA®, is a Professor at Creighton University's Heider College of Business. He is also founder, chairman and CEO of Economic Index Associates, a developer and licensor of innovative benchmark and investable indexes. Bob is the author of multiple books and over eighty articles in scholarly journals. He is co-author of the books Invest with the Fed, Strategic Value Investing, The Tools and Techniques of Investment Planning and Investment Banking for Dummies. He has published in The Journal of Finance, Journal of Financial Economics, The Journal of Portfolio Management, Financial Analysts Journal and The Journal of Investing, among others.

Bob has extensive media relations experience and has been quoted in The Wall Street Journal, Financial Times, Barron's, Forbes, and other leading publications. He has appeared on ABC World News, Bloomberg TV and CNN. He is the recipient of the Robert F. Kennedy Memorial Student Award for Teaching Achievement and Outstanding Faculty Member of the Year Award at Creighton for three years. Johnson earned a BSBA degree from the University of Nebraska Omaha, an MBA from Creighton University, and a PhD from the University of Nebraska-Lincoln.

Clinton Rushing, CFA

Instructor, Heider College of Business
Vice-President- Investment Strategy, D.A. Davidson & Co.

Clinton Rushing serves as Vice President-Investment Strategy at D.A. Davidson & Co. He has accumulated more than 20 years of expertise within the investment management industry, specializing in equity analysis and market strategy. Prior to his current role, Clinton served as Vice President-Investment & Brand Strategy at SMITH HAYES, where he served as Chairman of the firm's Equity Focus Group and also guided the firm's marketing and brand efforts. In addition, Clinton is an Instructor at Creighton University in the Heider College of Business, where he has taught on topics including Portfolio Management, Investment Analysis and Quantitative Methods for Investment Analysis.

Clinton received his Master of Business Administration (MBA) from Northwestern University-Kellogg School of Management, in Evanston, Illinois and earned his Bachelor of Science in Business Administration from the University of Nebraska-Omaha. Clinton also earned his Chartered Financial Analyst (CFA) designation and currently serves as President of the CFA Society of Nebraska.

Panelists

Susan Schmidt

Head of Public Equities, State of Wisconsin Investment Board

Susan Schmidt is the Head of Public Equities at the State of Wisconsin Investment Board. She has over 20 years of experience in the asset management industry and throughout her career has been an active investor in small- and mid-cap companies. Ms. Schmidt has extensive experience as a portfolio manager and research analyst and has served as president and chief executive officer of an industrial manufacturing company. Prior to her responsibilities at the State of Wisconsin Investment Board, Ms. Schmidt was the Head of U.S. Equities Portfolio Management at Aviva Investors in Chicago, a Senior Portfolio Manager and Senior Research Analyst at Westwood Holdings Group in Dallas, and a Portfolio Manager and Head of U.S. Equities for Mesirow Financial in Chicago.

Ms. Schmidt received an MBA in finance from Northwestern University, a BA in economics from Smith College, and a General Course Diploma in economic history from London School of Economics. She is a member of the CFA Institute and the CFA Society of Chicago.

Douglas Jackman, CFA

Thomas White International, President & PM

Doug Jackman, CFA is President & Portfolio Manager at Thomas White International, where he assumed the role as of September 28, 2018. He joined the firm in May 1995 and has been an active member of the firm's Investment Committee since 1996. Doug earned his MBA with concentrations in Finance and Accounting from the University of Chicago Booth School of Business. Earlier, he worked with Morgan Stanley in New York, developing equity and FX trading systems. He has an AB degree in Economics from the University of Chicago, where he also worked as a research assistant at the Center for Research in Security Prices.

Doug has been an active speaker on global and emerging market equities at industry and state conferences, including FPPTA, IPPFA, Opal, KORIED, TEXPERS, and TLFFRA. He is a member and active volunteer of the CFA Society Chicago and was a Board Member from 2014 to 2018, serving as its Chairman from 2016 to 2017. In addition, Doug has been an active volunteer with the University of Chicago and received its Alumni Service Citation in 2005 and will receive the Alumni Medal in May 2023.

Panelists *continued*

Tom Digenan, CFA, CPA

UBS Global Asset Management, Managing Director, Head of Investment Solution Specialists - Americas

Tom Digenan, CFA, CPA is Managing Director at UBS Global Asset Management. Tom earned his BS in Accounting from Marquette University and his MST in Taxation from DePaul University's Driehaus College of Business. Tom has served as head of the US Intrinsic Value Equity team at UBS. In this role, he was responsible for US equities portfolio construction and research. Prior to his role with the US Intrinsic Value Equity team, Tom was president of the firm's mutual funds and relationship funds organization. Prior to joining the UBS predecessor organization Brinson Partners in 1993, Tom was a senior manager at KPMG Peat Marwick, where he worked exclusively in the investment services industry. Tom is a member of the CFA Institute and the American Institute of Certified Public Accountants. He is formerly a Board member of CFA Society Chicago. Tom was an adjunct professor in the Marquette University Graduate School of Business from 2012-2016. In addition, Tom has been a guest lecturer at Northwestern University, University of Notre Dame and Creighton University. He has also served as an adjunct professor at DePaul University since 2020.

Mark Wynegar, CFA

President and Portfolio Manager, Tributary Capital Management

Mark is the president of Tributary Capital Management and is a portfolio manager for the firm's Small Cap, Small/Mid Cap and All Cap Equity strategies. Mark has over 25 years of industry experience and joined Tributary Capital Management's predecessor, First Investment Group, in 1999. Prior to joining Tributary, he worked for five years at Westchester Capital Management as a senior securities analyst and two years at Union Pacific Railroad as a financial analyst, both in Omaha, Nebraska. Mark received his Bachelor of Science in Business Administration from the University of Nebraska-Lincoln. He earned his Chartered Financial Analyst (CFA) designation in 1997.

Mark is a member of the CFA Society of Nebraska and the CFA Institute. He served on the Board of Directors of the CFA Society of Nebraska from 2002 to 2009, serving as president during 2007 and 2008.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