

2016 Hawk Center Investment Conference

Speaker Information

Lisa Ellis - Senior Research Analyst, Sanford Bernstein



Lisa D. Ellis is the Senior Research Analyst at Bernstein covering US Computer Services & IT Consulting.

Prior to joining Bernstein in 2013, Ellis spent 12 years at McKinsey & Company, where she was elected a Partner in 2007, and was a leader in the marketing & sales practice in North America for technology & telecom and private equity.

During her career at McKinsey, Ellis advised leading hardware, software, IT services, telecom services and defense communications companies on a range of strategy and marketing and sales topics. She also gained expertise in strategic topics, such as the Cloud, mobile applications and third-party distribution.

Ellis earned an MBA with Honors from the University of Virginia Darden Graduate School of Business in 2001, an MS in materials science and engineering from the University of Virginia in 1999, and a BS in physics and mathematics from the College of William & Mary in 1997, where she graduated Phi Beta Kappa and magna cum laude.

Tim Gaumer, CFA – Director of Fundamental Research, Thomson Reuters



Tim Gaumer is the Global Director of Fundamental Research at Thomson Reuters. He held the same position at StarMine, a company acquired by Thomson Reuters in 2008.

With more than 17 years of experience conducting fundamental analysis, Tim is widely regarded as an expert helping fundamental investor apply innovative analytics in their investment process. He has worked for two independent research firms and most recently as director of research at Jefferson Research & Management. Tim also previously worked at several buy-side firms, most recently at Transamerica Investment Management as an equity analyst and portfolio manager.

Tim is a much sought after speaker regularly presenting at global CFA Societies and industry conferences. He holds the Chartered Financial Analyst designation and has an undergraduate degree in Electrical Engineering and graduate degree in Business Administration.

Louise Purtle – Chief Strategist, Creditsights



Louise joined CreditSights in March 2002 as Chief Strategist. In that role she oversees the integration of the economic, fundamental, technical, and quantitative aspects of the firm's strategic analysis and publishes frequently on a range of economic, investment and industry themes.

Formed in November 2000, CreditSights is the leading provider of independent credit research. The company's mission is to deliver objective and superior decision support to managers of both debt and equity portfolios. CreditSights' research focuses on global corporate and sovereign issuers, and covers the entire corporate capital structure.

Prior to joining CreditSights, Louise was a Director and Head of US Credit Strategy at Deutsche Bank where she was responsible for the formulation of the bank's macro credit strategy and the marketing of this platform to a global investor base. Louise had a nine-year career at Deutsche covering the full range of US, European and Australian government and corporate bond markets. Before Deutsche, Louise spent ten years at Macquarie Bank in Australia where she specialized in the inflation indexed bond markets. Louise received an MBA from Columbia University in New York in 1999.

Jon Langenfeld, CFA – Head of Global Equities, R.W. Baird



Jon Langenfeld is Head of Global Equities and Director of Equity Research for Baird, with responsibilities for the publishing equity analysts across Baird's coverage universe, which includes Business Services, Consumer, Energy, Financials, Healthcare, Industrial, Real Estate and Technology. Jon previously served as the Associate Director of Research and Senior Analyst covering Transportation/Logistics.

Jon is a member of Baird's Executive Committee and Diversity Steering Committee. He is also a member of the board of Partners Advancing Values in Education (PAVE). Prior to joining Baird in 2000, Jon was a senior manager at PricewaterhouseCoopers, providing supply chain consulting services. Jon graduated cum laude with a BS in mechanical engineering and an MBA from the University of Notre Dame.

Jim Chanos – Founder & Managing Partner, Kynikos Associates



Mr. James Chanos, also known as Jim, serves as the Founder and Managing Partner at Kynikos Associates LP, and has been serving as its President since December 2003. Mr. Chanos founded the firm in 1985.

Prior to this, he was a Vice President and Analyst at Deutsche Bank Capital Corp. Before that, Mr. Chanos served as an Analyst at Gilford Securities. He has also served as an Analyst at Blyth Eastman, Paine Webber.

Mr. Chanos is also the Chairman of the Coalition of Private Investment Companies. He is the President of the Board of Trustees of The Browning School. Mr. Chanos also serves as a Trustee of The Nightingale-Bamford School and The New-York Historical Society. He is a Trustee of Citizens Budget Commission. Mr. Chanos is a Lecturer in Finance at Yale School of Management and at the Wisconsin School of Business, and teaches a class focused on Detecting Financial Fraud. He received a B.A. in Economics and Political Science from Yale University in 1980.

Ricky Sandler – Managing Member & Senior Portfolio Manager, Eminence Capital



Ricky Sandler is the Managing Member and Senior Portfolio Manager of Eminence Capital, LLC, a long/short equity investment manager that employs a 'quality value' approach to investing. Eminence Capital, LLC manages approximately \$3bn.

Before founding Eminence in December, 1998 Mr. Sandler co-founded and co-managed Fusion Capital Management, LLC, a long/short focused investment manager. Prior to that Mr. Sandler was a research analyst covering a wide range of industries and companies for Mark Asset Management, a research driven investment management organization.

Mr. Sandler received a BBA in Accounting and Finance graduating with honors from the University of Wisconsin. He currently serves as a board member for the University of Wisconsin Foundation and as a member of its Investment Committee. He is also a Lecturer at the Wisconsin School of Business since 2014, where he teaches a class in Applied Equity Market Research.

Paul Leff – Co-Founder, Perry Capital



Paul co-founded Perry Capital in 1988, and has served as the Vice Chairman, Senior Managing Director, and Managing Partner at the firm.

Prior to 1988, Paul was a principal and portfolio manager of Harvard Management Company. From 1984 to 1986, he was a trader and research analyst at Kayne, Anderson and Co., where he specialized in corporate reorganizations.

Paul is a board member of the University of Wisconsin Foundation and the Co-Chairman of the Wisconsin Eastern Alumni Scholarship Fund, an organization providing academic scholarships to minority, disadvantaged students from New York City. He has been a Lecturer at the Wisconsin School of Business since 2014, where he teaches a class in Applied Equity Market Research.

He earned an MS in finance in 1984, and a BBA in finance and economics in 1983 at the University of Wisconsin.

Prof. Mark Ready – Academic Director, Hawk Center



Mark Ready holds the Jeffrey Diermeier Chair in the Department of Finance, Investment, and Banking at the Wisconsin School of Business. He is also the department chair of Finance. He joined University of Wisconsin-Madison in 1990, after completing his PhD at Cornell University.

From the outset, he has been able to bring a practical dimension to his courses, having spent seven years in various finance positions at Ford Motor Company before pursuing his Ph.D.

Ready's research focus is in investments and he is well known and highly regarded in the academic community. His work has been cited in more than 450 separate articles published in finance and accounting journals, and he has served as associate editor for both the Review of Financial Studies and Financial Management. He has published studies examining risk and return of a variety of trading strategies, ranging from technical trading rules for timing market returns, to strategies that select individual stocks based on various fundamental measures.

He served on NASDAQ's Economic Advisory Board from 1998-2000, and he was the chief economist and director of the Office of Economic Analysis at the U.S. Securities and Exchange Commission from April 2000 through January 2001.

Ready earned his Ph.D. from Cornell University.

Michael M. Knetter - President & CEO, UW Foundation



Michael M. Knetter joined the University of Wisconsin Foundation as president and chief executive officer on October 16, 2010 after eight years as dean of the Wisconsin School of Business. As dean, he orchestrated the novel \$85 million Wisconsin Naming Gift, the expansion of Grainger Hall and the restructuring and improved national standing of the full-time MBA.

Prior to joining the UW-Madison in 2002, he was associate dean of the MBA program and professor of international economics in the Amos Tuck School of Business at Dartmouth College. He also served as senior staff economist for the President's Council of Economic Advisors for former presidents George H.W. Bush and Bill Clinton.

A native of Wisconsin, Knetter is a director of American Family Insurance and serves as a trustee of Neuberger Berman Funds. Recently he chaired the capital campaign for The Road Home Dane County, a non-profit that assists in finding housing and work solutions for homeless families in Dane County.

Knetter completed his undergraduate studies in economics and mathematics at the University of Wisconsin-Eau Claire and his Ph.D. in economics at Stanford University.

Greg Gard – Head Coach, Wisconsin Badgers Men's Basketball



Long considered one of the best assistant coaches in all of college basketball, Greg Gard was named head coach at the University of Wisconsin on March 7, 2016. A coaching veteran of more than 20 years, Gard is in his 15th season on the Badgers basketball staff, serving as the team's associate head coach since July of 2008.

In his inaugural season as head coach, Gard would lead the Badgers to the 2016 NCAA Tournament Sweet 16 becoming just the second-ever first-year coach to win the Jim Phelan National Coach of the Year award.

Gard, 45, took over as the Badgers' interim head coach following the retirement of longtime head coach Bo Ryan on Dec. 15. Previously, Gard served as an assistant coach to Ryan at UW-Platteville from 1993-99. During Gard's years on the Pioneer staff, UW-Platteville compiled a 161-13 (.925) record and won three NCAA Division III titles, five straight Wisconsin Intercollegiate Athletic Conference (WIAC) championships and appeared in six consecutive NCAA tournaments. In his final year at UW-Platteville, Gard served as Ryan's top assistant in charge of recruiting, camp operations and scouting. He also worked as an advisor in the university's admissions office.

Prior to joining Ryan's staff in Platteville, Gard spent three seasons at Southwestern High School and one at Platteville High School, where he served in junior high and assistant varsity coaching capacities.

Gard is a 1995 graduate of UW-Platteville with a degree in physical and health education. He received a master's degree in counselor education from Platteville in 2007. Gard and his wife, Michelle, have two daughters Mackenzie and Peyton and a son, Isaac.