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## professional

### **What are top 3 principles for success in your industry?**

I work as a research analyst following oil stocks for a major brokerage firm. And to me, after having had a number of years of experience in this business, it appears as if the three key principles that I would need or desire for success would be integrity, communication and follow through. Integrity because our clients want people that are honest and will tell them exactly what they're thinking, the way they see it. Communication, because you can't take in research and do your research and not tell anyone. You have to let people know what you're thinking. The successful people are able to communicate their message in the best way possible. Follow through is very important because I see hundreds and hundreds of clients every year, but if I don't have a personal follow through every time I talk to them, then I'm just simply a voice coming out of the ether, so to speak. If you are someone that they run into once every six months, but you don't have the follow through to establish and continue to further a relationship, your success will be limited.

### **What character qualities do you look for when hiring?**

If I could point to a single, most important character quality, it's integrity. Integrity has a number of different components. Some of those components include honesty, reliability, loyalty and a number of other things. But integrity really is what someone is all about. If you have integrity, you are reliable, your demands are usually appropriate, you deliver on your promises. If you have integrity, people can trust you. Trust is something that in the business world, is a very scarce and very valuable commodity.

### **How did you get involved in the career you are in?**

When I was in college, I studied German literature and you would think, gosh, that's not very directly applicable to a Wall Street job. However, in one of my courses, I ended up reading about a Jewish family, the Warburgs. They were bankers to the Emperors and ultimately were persecuted during the Holocaust, moved their operation to London and started up SG Warburg & Company. I thought that was a fascinating history and I said, "Gee, that would be a neat place to work." Well, I applied there and by golly, they took me and I went and trained in London, met some people in the energy group there and ultimately said, "Geez, these guys are pretty smart, let me see if I can hitch myself to this cart, if you will" and so I did. From there, I started the progression of moving into energy investment banking, mergers and acquisitions, as well as corporate finance and ultimately into energy research. And here I am.

## personal

### **What does balance mean to you? How important is balance to success?**

Balance is extremely important to my success. When I don't have balance, one part of my life could be going exceptionally well and it's usually to the detriment to other parts of my life. I find that when I keep a humble outlook on every part of my life that I'm involved with and I try not to take too much credit for anything that's going well or too much blame for what's going horribly, then my attitude



towards the rest of the life tends to be more measured and more balanced. I'm more at peace and the people around me are less annoyed.

### **Have you ever had a wakeup call in your life?**

I have had ... well I'm not very old ... but I have had one or two wake up calls in my life. The one that really leaps out to me is when, my girlfriend, soon to be my fiancée and ultimately my wife, said she was going to cut off communication with me because I was trying to have it both ways. I was trying to be friends with Jane and have her as my soul mate, but I wanted to play the field. I realized when that happened that I had a choice. I could commit to Jane and live with the ups and downs and all of the warts ... whatever she has and that I would have ... that we would all bring into the relationship ... I could live with that and have Jane in my life or I could let her go out of my life and have that void. That was a real wake up call and what catalyzed our decision to ultimately get married.

s p i r i t u a l

### **Can you follow Christ and still have a successful career, family and such?**

I think that it's very possible, and in fact advised, to follow Christ and have a successful career. I would like to refer to the Bible about this because my faith tells me that the Bible is my road map. Looking at the Gospel of Luke 2:52, it said how Jesus grew in stature in wisdom. Not only in the eyes of God, but also in the eyes of man. And that's Christ. That's our Savior. That's Jesus Christ that grew in the stature in the eyes of men. What that basically says is that Christ was held in high esteem by His peers. A successful career ... especially the type of job that I have ... in order to be successful, you need to be held in high esteem by your peers. I believe that Christian faith requires not just talking about how faithful you are, but actually living a life that is exemplary of faith and shows the fruits, if you will, of your faith. That is what serves as an example to your peers. That's what gets their respect. So definitely I think that faith ... Christian faith ... is a prerequisite for success in the work place. One of my prerequisites.

### **Is faith critical to leadership or character?**

I think that without faith, you can't have true character or true leadership. Let me tell you why I think that. Faith is the foundation for both and leadership demands consistency, almost first and foremost. Faith is a consistent, unchanging, unyielding and unwielding, if you will, belief. It's not shakable and it doesn't change with circumstance. Ultimately, that type of unshakable foundation is really demanded for in qualities such as character.