**Call with David Gottlieb**

* Wharton Undergrad B.S. in Finance/Political Science
* Fixed Income
  + Donaldson, Lufkin, Jenrette
  + Credit Suisse
  + EM Fixed Income Find/Third Wave Asset Management
* Senior Portfolio Manager – Schroders
* CIO – Triple J Investments LLC (Single Family Office)

**Opening & Context Setting**

* How did you enjoy your time at Penn? Were you involved in any extra-curricluars?
* Do you live in Manhattan?
* Could you tell me a bit about your current role as CIO at Triple J?
* What does a typical day or week look like for you in this role?

**Current Role & Responsibilities**

* What are your primary responsibilities as CIO beyond investment decisions?
* How do you approach asset allocation for a single family office versus institutional investing?
* What role does alternative investing play in your portfolio construction?
* Do you work with external managers, and if so, how do you select and monitor them? How do you discriminate between those who will provide value vs. those who just want more AUM

**Career Journey & Transition**

* You've had an interesting career progression from fixed income to portfolio management to CIO. What drove each transition?
* How did your fixed income background influence your approach to portfolio management?
* What was the biggest adjustment moving from Institutional side to running investments for a family office?
* What skills from your fixed income days do you still rely on most?
* Was the move to a single family office something you actively sought, or did the opportunity find you?

**Breaking Into Finance (Career Advice)**

* I don’t know when baseball will end, but I have the time now and want to learn as much as I can and kind of get the ball rolling on the side. What would your advice be for someone making this career change?
* What do you think are the most valuable traits or skills you look for when hiring?
* Are there specific areas of finance you'd recommend focusing on for someone starting later in their career?
* How important is getting an MBA versus gaining practical experience?
* What networking strategies would you recommend?
* Are there particular certifications (CFA, FRM, etc.) that you value?

**Talent & Skills Assessment**

* When you're evaluating candidates, what separates the good from the great?
* How do you assess someone's investment acumen in an interview?
* What soft skills are most critical in investment management roles?
* How important is cultural fit versus technical competence?
* Do you prefer generalists or specialists on your team?

**Industry Outlook & Trends**

* Where do you see the wealth management and family office space heading over the next 5-10 years?
* What are the biggest challenges facing family offices today?
* How is technology changing how you approach investment management?
* What asset classes or investment strategies are you most excited about currently?
* Are there any areas of the market you're particularly cautious about?

**Personal Development & Learning**

* How do you stay current with market developments and investment trends?
* What resources (publications, conferences, networks) do you find most valuable?
* What's the most important lesson you've learned in your career so far?
* If you were starting your career over today, what would you do differently?

**Closing Questions**

* What advice would you give to your younger self when you were starting out?
* Are there any questions you wish people would ask you that they don't?
* Who in the industry do you most admire and why?
* Would you be open to staying in touch as I navigate this career transition?

**Interview Tips:**

* **Listen actively** - let their answers guide follow-up questions
* **Be specific** - ask for concrete examples when they mention concepts
* **Show genuine curiosity** - about both their current work and career journey
* **Take notes** - on names, firms, resources they mention
* **Be prepared to share** - your own background and why you're interested in finance
* **Follow up** - send a thank you note within 24 hours