



An original golden gopher

A founding member of the Funds Enterprise looks back.

Peter Erickson, '98 MBA, is an original—a member of the original Carlson Funds Enterprise class in 1998, that is.

After graduating from DePauw University in 1993 in political science, Erickson worked in Washington, D.C., where he worked for a foundation that recruited and sent professionals to newly developing Eastern European countries to help build the infrastructure these countries needed.

How did Erickson get to the Carlson School and become one of the first Carlson Funds Enterprise students?

“I saw a path down one road, not multiple paths down multiple roads,” he says. After three years of managing much of the D.C.-based program, he reached a fork in the road. He could remain in Washington and work on Capitol Hill, or he could go back to school.

Despite never having had a business class, Erickson elected to earn his MBA at the Carlson School, focusing on finance and marketing. Interested in finance, he did a summer internship at Sit Investment Associates. He also

served as a teaching assistant to the Funds Enterprise’s founding academic director Professor Tim Nantell when the Carlson Funds Enterprise was formed. (Back then, the growth fund was known as the Golden Gopher Growth Fund; the fixed income fund’s inception was in March 2003). As one of

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the first students to participate in the Enterprise, Erickson was involved in setting up the investment procedures that guide the growth fund today.

Erickson investigated local restaurant stocks as a student analyst. He asked himself if he would put his own money in the business. In 1998, he and his two

classmates said “no,” a recommendation that was accepted by the mentors.

He says, “The key skills needed in the business are the abilities to think critically and to follow your instincts.”

In addition to looking at the local restaurant industry for investment ideas, he and some classmates developed a business plan for a golf company. But it was while pitching the idea to some local investment bankers that he found his true calling. One of the listening bankers was looking for an associate for the newly formed TripleTree investment bank in Minneapolis. The golf company idea was set aside, and Erickson joined the firm as its second employee.

Now a senior principal at TripleTree, Erickson is involved in the management of TripleTree’s transaction and advisory services, with a focus on human capital management and outsourcing services. He is also involved in researching, valuing, and negotiating the acquisition or financing of high growth private and public companies. He has consummated approximately 20 deals, while touching nearly every transaction that Triple Tree has completed.

New professional advisor



Jeannette Parr, '88 MBA, is the new professional advisor to the Carlson Funds Enterprise fixed income fund. Parr has 17 years of experience in the

investment industry as an analyst and portfolio manager, the last 10 of which were with American Express. Parr is a

CFA. Her area of expertise is in investment grade and high-yield bonds, which is the direction that the Funds Enterprise is heading with the new fixed income fund benchmark, the Lehman U.S. Intermediate Government/Credit Bond Index.

“I am so glad to be back at the Carlson School,” says Parr. It’s amazing to see how involved the business com-

munity is. The mentors and board of directors for Carlson Funds Enterprise provide a direct link to the business world, and we are also fortunate to have guest lecturers from several local corporations come in and share their expertise in the classroom. This enables our students to explore different disciplines within finance and find the best fit as they launch their careers.”