

# COMPASS WATCH

DAVID M. CARLSON

LEIGH E. NIEBUHR

RONALD J. POOLE

MARK S. HALVERSON

CHARLES M. KELLEY

JAY M. JACKLEY

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## COMPASS PORTFOLIO MANAGEMENT TEAM EXPANDS: WELCOME JAY JACKLEY!

While many other financial institutions are cutting back during this economic downturn, Compass is expanding. We are delighted to announce that Jay Jackley has joined our firm.



Jay has been in the investment field for nearly thirteen years as a wealth management advisor, helping select money managers for client portfolios. In 2001, Jay received a CIMA designation (Certified Investment Management Analyst) demonstrating his skills in this area. He has greatly enjoyed assisting clients in identifying their financial goals, risk tolerance and many other considerations involved in constructing an appropriate portfolio. This admiration has clearly been mutual, since Jay was listed as a “2008 Five-Star Wealth Manager: Best in Client Satisfaction” in the January 2008 issues of Twin Cities Business and Mpls. St. Paul magazines. However, Jay wanted to do more than select managers for his clients. He preferred to select stocks and bonds directly for his client portfolios. Joining our team at Compass - - a group which has been selecting securities successfully for over twenty years - - will give him just that opportunity.

Searching for quality investment gems has been a long-standing interest for Jay. Prior to entering the securities business, he worked as a Certified Gemologist/Appraiser in the Twin Cities. Hunting for mispriced, quality stocks and bonds isn't all that different from searching for quality diamonds, sapphires and rubies. Finding a great stock or bond provides a similar kind of satisfaction.

Jay becomes the sixth member of the portfolio management team at Compass. This group meets each Thursday morning to review core holdings and to discuss news about earnings, dividends and many other significant issues about the companies we hold. We then rate each core company on the basis of growth and value. We also review our supplemental list of companies that may be purchased if the price (valuation) is right. Finally, we hold conference calls, or visit the companies we own or are considering buying in order to dig more deeply into these businesses.

When Jay isn't working, he enjoys spending time with family and friends. Tennis is a special interest (both sons are state high school doubles champions). He also relaxes by fishing and hiking in the Colorado mountains with his wife, Mary.

We look forward to a long and successful relationship with Jay, as will his clients.

**\*\* For more information regarding our company, disciplines and results, please call, write, e-mail or visit our website: [www.compasscap.com](http://www.compasscap.com) \*\***