Institutional Asset Management, Virtual Events & Programming

Oshkosh CEO Discussion and Plant Tour

Overview

Tuesday, Nov. 10 | 4:00 PM - 5:00 PM
Virtual Only

Attend:
Free for Members | $25 Nonmembers

Register »

In a live virtual meeting with CEO Wilson R. Jones and other executives of Oshkosh Corporation, society members will learn about this Fortune 500 mid-cap that generates sustainable profits from its market leadership in essential industries, manufacturing Pierce fire trucks, tactical wheeled vehicles used by the men and women of the U.S. armed forces and other vocational trucks used broadly in construction and other industries. The event will include a virtual tour of the company's Appleton, Wisconsin custom fire truck manufacturing plant, along with questions from a panel of knowledgeable analysts. This direct access will be a way to introduce the company to new investors, and a chance for investors who are familiar with Oshkosh to ask questions.

The virtual tour will also be a way for the society to go back to its historic roots of company presentations, but by using new virtual technology this will be much more informative than a standard PowerPoint presentation. Moreover, with a panel of analysts, there will be insightful questions to help investors understand the company without a canned company presentation. The idea is to be more of a meeting that CEOs have with investors in boardrooms where the questions drive the discussion.

Company Images

Agenda

4:00 PM | **OPENING REMARKS AND INTRODUCTIONS**

Leo Schmidt, CFA, Chair, CFA Society New York's Institutional Asset Management Group

Gary Lutin, Chairman, The Shareholder Forum

4:05 PM | **CEO WILSON JONES WELCOME FROM PIERCE PLANT (FIRE & EMERGENCY VEHICLES)**

Wilson Jones, Chief Executive Officer, Oshkosh Corporation

4:10 PM | **INTRODUCTION TO COMPANY PRODUCTS & MARKETS**

4:25 PM | **VIRTUAL PIERCE PLANT TOUR**

4:35 PM | **JONES & OTHERS CONTINUE REVIEW WITH PANEL FROM PIERCE SHOWROOM**

Oshkosh Corporation

Wilson Jones, Chief Executive Officer

Patrick Davidson, Senior Vice President, Investor Relations

Moderator

David Allen, CFA, Institutional Director, Schroders

Panelists

Steve Barger, Managing Director, Equity Research, KeyBanc Capital Markets Inc.

Jamie Cook, CFA, Managing Director, Head of U.S. Capital Goods Research, Credit Suisse

Stanley Elliott, Director, Diversified Industrials Sector, Stifel Financial Corporation

Christopher Meeker, CFA, Portfolio Manager, Research Analyst, Franklin Mutual Series

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4:50 PM | **AUDIENCE QUESTIONS**

5:00 PM | **CLOSING REMARKS**

Leo Schmidt, CFA, Chair, CFA Society New York's Institutional Asset Management Group

OSHKOSH™

Additional Details

Learning Outcomes

- Meet and interview Oshkosh's CEO Wilson Jones
- See an Oshkosh manufacturing facility
- Learn about a company that prospers from making needed products
- Observe what buyside analysts want to know
- Gain a deeper understanding of Oshkosh
- See how professional analysts interview a CEO

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Leo Schmidt, CFA

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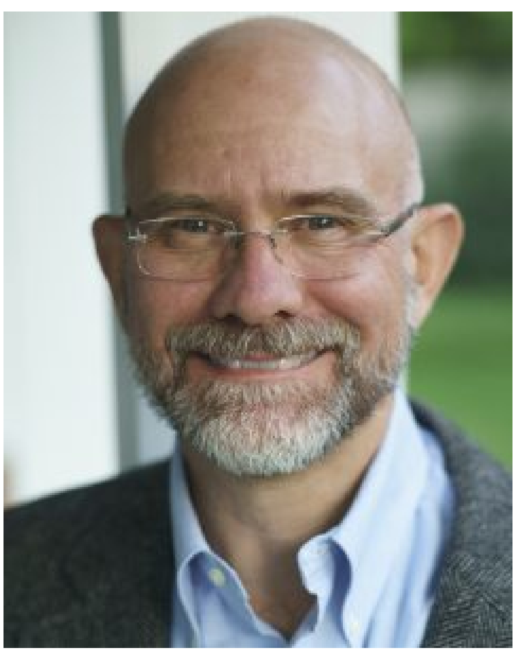
Leo Schmidt, CFA



Leo Schmidt, CFA, has been an institutional investor for over 20 years. Most recently, he was a Senior Equity Analyst for the Chubb Corporation for 10 years where he was responsible for all analysis on a $2 billion 90 stock portfolio. The Chubb equity portfolio had an outstanding record with over 200 basis points of outperformance versus the S&P 500 on a 10, 5, 3 and 1 year(s) basis. Prior to the Chubb Corporation, he worked at Advent Capital Management where he was a Consumer Analyst for Convertibles Strategies, including Balanced and

Arbitrage as well as long-short high yield. He also worked as a Consumer analyst at a $20 billion Nuveen managed accounts fund. He began his investing career at Reich & Tang Capital Management, focused mainly on pension plans and endowments, where he was a generalist. He graduated from Columbia University, Cum Laude, Phi Beta Kappa, with a double major in Economics and History. He earned an MBA from NYU with a double major in Accounting and Finance. He is married with one child and resides in Manhattan, NY. He is currently starting up a new equity fund with Robert Witkoff, former Chief Investment Officer at Chubb.

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Gary Lutin

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Gary Lutin

Gary Lutin is chairman of The Shareholder Forum, which he founded in 1999 to conduct programs of company-specific investment issues for analysts. He had previously been the lead investor in private acquisitions of companies with the management oversight of J. Keith Louden, the prominent leader of industrial companies whose views of sustainable corporate management are enjoying current recognition.

competitively superior mid-size companies, making it the model for a subsequent generation of independent investment banks. Mr. Lutin had been trained at Manufacturers Hanover Trust, Weeden & Company, the Committee for Economic Development, and Salomon Bros. & Hutzler, and had graduated from Yale University in 1969 with an economics degree.

NOVEMBER 2020

Nov **10** Tue

Oshkosh CEO Discussion and Plant Tour

Come explore with us, in a live meeting with CEO Wilson R Jones and plant tour, how this Fortune 500 industrial makes sustainable profits as a market leader in essential products. Questions along the way will be asked by a panel of buyside analysts and possibly a sell side analyst or two.

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Wilson Jones

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Wilson Jones

Wilson Jones is Oshkosh Corporation's Chief Executive Officer and a member of the Company's Board of Directors. He most recently served as President and Chief Executive Officer, a position to which he was appointed in January 2016.

Mr. Jones joined Oshkosh Corporation in 2005 as the Vice President and General Manager of the Airport Products business unit. He was appointed to Executive Vice President and President of the Fire & Emergency segment in February 2008. In 2010, Mr. Jones took leadership of the Company's Access Equipment segment where he helped accelerate global expansion and new product development. In August 2012, Mr. Jones was appointed to President and Chief Operating Officer.

Mr. Jones serves on the Board of Directors for Thor Industries, Inc., one of the world's largest manufacturers of recreational vehicles, as well as on the boards of the Green Bay Packers, Boys & Girls Club of Oshkosh, Oshkosh Kids Foundation, Oshkosh Chamber of Commerce and Wisconsin Manufacturers & Commerce.

Mr. Jones holds a bachelor's degree in business administration from the University of North Texas G. Brint Ryan College of Business.

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Patrick Davidson

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David Allen, CFA

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David Allen, CFA

David Allen, CFA, is an Institutional Director at Schroders, where he is responsible for sales and relationships with the firm's largest clients and prospects. He works across all product lines and asset classes to export the firm's intellectual capital to large plan sponsors, including public funds, corporate clients, and endowments & foundations. David served clients in a similar role at AllianceBernstein, and was also a Principal at Bernstein, serving SFOs, MFOs, and other wealth management clients. Prior experience includes fixed income consulting for Bank-Owned Life Insurance clients, foreign exchange trading throughout the 1990s, and entrepreneurial pursuits. David is a CFA Charterholder, a member of CFANY, and Co-Chair of its Global Investment Committee. He holds a B.A. in Economics from the University of Pennsylvania.

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Steve Barger

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Steve Barger

Steve Barger is a Managing Director, Equity Research Analyst with KeyBanc Capital Markets Inc. He joined the Company in 2004 as a research associate, covering automotive parts suppliers. He was promoted to research analyst in January 2006, and his research coverage is focused on industrial manufacturers.

Barger's previous experience includes serving as general manager and partner at Cleveland Tank & Supply, Inc., as well as owning and operating a local business.

Prior to that, Barger served as a Sergeant in the U.S. Army's 75th Ranger Regiment.

Barger earned a Bachelor of Science degree in management, with a concentration in finance, from the Weatherhead School of Management at Case Western Reserve University in Cleveland.

In its 2019 Analyst Awards, ThomsonReuters recognized Barger as the #3 earnings estimators in the Trading Companies & Distributors sector. This is his second Starmine/ThomsonReuters award. In its May 2011 "Best on the Street" Analyst Survey, the Wall Street Journal ranked Barger as the #5 stock picker in the Heavy Machinery and Materials sector for 2010. This is Barger's second WSJ award.

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Jamie Cook, CFA

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Jamie Cook, CFA

Jamie Cook is a Managing Director of Credit Suisse and is the sector head for the U.S. Capital Goods Research team. In addition, Ms. Cook is the lead analyst for both the Machinery and Engineering & Construction sectors. Ms. Cook is ranked within two categories of Institutional Investor's All-America Research team including Engineering & Construction sector (Ranked #1) and Machinery (Ranked as Runner Up). She has been honored consistently by the Financial Times and Starmine for both the Machinery and Engineering & Construction sectors. Ms. Cook serves as a frequent presenter to corporate boards, senior management teams and industry groups. She began her sell side equity research career over twenty years ago including nineteen years at Credit Suisse. Ms. Cook holds a BA and MA in Mathematics from Boston University and is a Chartered Financial Analyst.

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Stanley Elliott

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Stanley Elliott

Stanley Elliott joined Stifel in 2006. Based out of the Richmond office, Stanley is a Director in the Diversified Industrials sector, covering Machinery and Constructions Materials. He was previously an associate analyst supporting the research of the home furnishings and building materials industries before launching coverage on the Industrial space in 2011. He has won StarMine awards for both earnings estimates and stock selection.

Stanley holds a BA from the University of Richmond and earned an MBA from the College of William & Mary.

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Christopher Meeker, CFA

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Christopher Meeker, CFA

Christopher Meeker is a portfolio manager and research analyst for Franklin Mutual Series. He is a portfolio manager for the Franklin Small Cap Value Fund. His research coverage includes the industrials and materials sectors. He joined Franklin Templeton in September 2012 as a research analyst with the Franklin Equity Group's U.S. Value team.

Mr. Meeker has 21 years of experience in the financial services industry including 16 as a value focused equity research analyst covering multiple industry sectors, market capitalizations and geographies.
Prior to joining Franklin Templeton, Mr. Meeker worked as a senior research analyst at Federated Global Investment Management with a focus on the international markets.

Mr. Meeker also has prior investment experience at Farr, Miller & Washington LLC, a boutique asset manager that employed a long-term and 'private market value' based investment process. Mr. Meeker was a principal, portfolio manager and research analyst at the firm and initiated and managed the firm's small/mid cap strategy for six years.

Prior to his buy-side work, Mr. Meeker spent six years as an investment banker with Houlihan Lokey Howard & Zukin, Inc. and AMT Capital Advisors, LLC specializing in M&A transactions and corporate valuation mandates.
Mr. Meeker holds a B.A. in finance from Hobart College and is a Chartered Financial Analyst (CFA) charterholder.

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