

JASON APOLLO VOSS

Jason Apollo Voss is CEO of Active Investment Management (AIM) Consulting, LLC which helps small to medium-sized active investment management firms create and deliver long-lasting *a*.

Jason was co-portfolio manager of the Davis Appreciation & Income Fund, which bested the S&P 500 by 49.1% during his tenure, was Lipper #1, and one of the first ten funds awarded Morningstar's Stewardship Grade "A".

Director of Content –

Jason most recently rented his services to [CFA Institute](#) and its 150,000+ investment professionals in 140 countries, where he was global Content Director. His primary responsibility was to stay apprised of finance industry trends and to curate and create content that made CFA Institute's members smarter and wiser. To this end he researched and authored true thought-leading products, including the investment industry's first ever [Investment Idea Generation Guide](#); its first scientific research into lie detection, culminating in the publishing of another industry-first *Lie Detection Guide: Theory and Practice for Investment Professionals*; and finally the industry's first *Meditation Guide for Investment Professionals*.

Jason is also the most popular author for CFA Institute's Enterprising Investor, responsible for millions of page views, or 1 in 6 of the total, and 40% of comment traffic, despite the fact that there are over 300 authors on the platform. His work has led to him being quoted in, or interviewed by: Marketplace Morning Report (NPR), the Wall Street Journal, Financial Times, Bloomberg, Institutional Investor, BBC's Today Programme. Jason was also the lead author for the award-winning white paper, *Future State of the Investment Profession* that was quoted by Blackrock founder, Larry Fink. His work for CFA Institute has led to dozens of speaking engagements in over 30 countries. Last, Jason was also the co-developer of and host of cutting-edge video products, such as *Beyond Analysis*, *Frontiers of Behavioral Finance*, *Virtual Link*, and *Conference Live*.



Portfolio Management –

Over the course of his investment career as co-Portfolio Manager of the Davis Appreciation & Income Fund (DAIF) the fund bested the NASDAQ by 77.0%, the S&P 500 by 49.1% and the DJIA by 35.9%.* The DAIF was regularly ranked in the top decile of its investment category and further it earned a Lipper #1 ranking. The Fund was named a Lipper Leader, and was a perennial [Morningstar Analyst Pick](#). Most impressively, the DAIF was one of Morningstar's first ten mutual funds given a Stewardship Grade of "A."

Board Member –

Jason has served on the Advisory Board for [Quantum Leap Innovations](#); [Mindful Business Conference](#); [NuraHealth](#); and the [Institution Design Group](#). Additionally, he serves on the [Framework Panel](#) for the [International Integrated Reporting Council](#). Previously he served on the Advisory Board for Clinton Capital Management, a Chicago-based hedge fund.

The Sarasota Institute co-Founder –

In 2017 Jason co-founded a 21st century think tank, [The Sarasota Institute](#), along with globally renowned futurist, [David Houle](#), and marketing godfather, [Philip Kotler](#). We are thinking about solutions to the big questions facing the World and the United States today. Our focus is on critical topic areas are: technology, public policy, natural resources, marketing & media, intelligence, health care, education, democracy, climate change, and economics. Other members include [William Johnson](#), retired president of the NYSE, and [Dr. Gerald Zaltman](#), Joseph C. Wilson Professor of Business Administration Emeritus at Harvard Business School.

Books –

[The Intuitive Investor: A Radical Guide for Manifesting Wealth](#) is unique within investing for its emphasis on the mind's creative and intuitive functions and was a [2011 Foreword Reviews Business & Economics Book of the Year finalist](#). Other works by Jason include the finance industry's first book about coming up with new investment ideas, [The Investment Idea Generation Guide](#); as well as an industry first *Lie Detection Guide: Theory and Practice for Investment Professionals* to complement analysts' hard skills when evaluating executive management of prospective investments; and a meditation guide for investment professionals, given meditation's scientifically proven benefits to overcome stress, improve mental functioning, improve creativity, improve intuition, and help practitioners overcome behavioral biases. Jason is also the co-author with David T. Larrabee, CFA of [Valuation Techniques: Discounted Cash Flow, Earnings Quality, Measures of Value Added, and Real Options](#).

In the Press –

Voss has given hundreds of press interviews, been cited in, or contributed to: the [Wall Street Journal](#), Barron's, [Business Week](#), [Bloomberg](#), [Institutional Investor](#), Reuters, Money, the Wall Street Transcript, [Smart Money](#), [Journal of Private Equity](#), [Journal of Behavioral Finance](#), public radio's [Marketplace Business](#), the [BBC's Today Programme](#), [Zero Hedge](#), [Seeking Alpha](#), [Morningstar](#), [Business Insider](#), U.S. News & World Report, [Red Herring](#), Value Line, [Blog on Books](#), [AskMen.com](#), [Trust Across America](#), [Cafe Mutual \(India\)](#), [The Globe and Mail](#), [Yahoo! Finance](#), etc. You might have seen him on [television](#) speaking about the importance of analysis coupled with *intuition* in order to generate excellent investment returns. Or you might have seen one of his pieces written in his previous role as a [Forbes Contributor](#).

Speaking –

Jason speaks at a number of industry conferences including: [the Mindful Business Conference](#); [Battle of the Quants](#); [Fund Forum USA](#); the [Morningstar Investment Conference](#); [the Conference on Sustainable, Responsible, Impact Investing](#); [the CFA Institute Annual Conference](#); [the Indian Association of Investment Professionals](#); [the Burridge Conference](#); and so on.

Contributing Author –

You may also have read about Jason in other authors' books, including Patricia Aburdene's *Conscious Money: Living, Creating, and Investing with Your Values for a Sustainable New Prosperity*, David Houle's *Entering the Shift Age: The End of the Information Age and the New Era of Transformation*, Tom Brakke's *Letters to a Young Analyst: advice and resources for aspiring investment professionals*, and Chinhwee Tan and Tom R. Robinson's *Asian Financial Statement Analysis*.

Intuitions –

Other noteworthy accomplishments include: his October 21, 2004 epiphany in which he realized there was going to be a global recession, a realization that led to his retirement August 19, 2005; and his [calling of the March 9, 2009 market low just several days after the fact](#) on his blog.

Education –

Voss holds a Bachelor of Arts in Economics, and a Masters of Business Administration with an emphasis in Finance and Accounting, from the University of Colorado. Additionally, he is a Chartered Financial Analyst (CFA) as designated by CFA Institute. Lastly, he has studied the ancient martial art of ninjutsu, and has also taught meditation.

Jason is both a lifelong meditator and conscious capitalist.

* Results include the effects of dividends and stock splits on total return. Results were calculated based on data published by *Yahoo!* Finance; DAIF ticker symbol is DCSYX and covering the period of September 22, 2000 to August 18, 2005 – the length of Jason Apollo Voss' tenure as co-portfolio manager of the Davis Appreciation & Income Fund.