

Columbia Asset Management Presents: Our Employee Newsletter!

Edition 2: Chat with Charlie



Charlie Cook, financial analyst, joined Columbia in December 2013. She grew up in west Michigan, but Ann Arbor became home during college at the University of Michigan. A few fun facts include that she is the youngest of three and the first in her family to go to university. Her first taste of finance and accounting was at an investment banking internship. After the internship, she thought tax accounting would build a better base for her career, so she worked in Chicago and then New York City for Ernst & Young. When she moved ‘home’ to Ann Arbor, she worked for a regional accounting firm, where she met Brian through a mutual client. She spends most of her free time with her husband, Andy, and their son, Calum. She is also quite fond of her “first child” — her cat, Jules, and is a self-proclaimed cat lady. She enjoys cooking, baking and casually exercising. She loves to travel, and usually tries to plan one big trip a year; last summer, her family went to Portugal!

What's your favorite part of working at Columbia Asset Management?

My favorite part of my work is that I am constantly learning! Learning about and analyzing companies, understanding our clients, their families and their different financial goals, developing investment strategies — you name it. I especially love feeling like I can be helpful and make a difference to people. Our office is very flat so I can be involved as much or as little as I want. I also like sitting by the door so I can keep an eye on everything! Kidding...kind of 😊

Best advice you could give to any client?

Make better passwords! My advice is to make a schema of words or a phrase you can remember, rather than random numbers, letters or symbols that you (anyone) will forget. It doesn't hurt to set reminders in your calendar to change all of your passwords.

Best advice you've been given?

Speak up. You have to ask for something that you want or need. I've found this to be helpful not just professionally, but personally too.

Do you have a hidden talent?

I used to do competitive cheer in high school so I can do a back handspring. And I'm kind of artistic.

What is your favorite book?

That's tough because I get through probably two books per month and it is hard to remember them all. A few standouts that I would recommend to anyone are *Paris* by Edward Rutherfurd, *City of Thieves* by David Benioff, *Steps Out of Time* by Katharine Soper or James Clavell's *Tai-Pan*. I tend to take people up on their book recommendations, so if you have good ones, please send them my way!