



## Dale H. Coates, CFA

*Vice President, Institutional Portfolio Manager, Principal  
Johnson Institutional Management, Cincinnati*

Dale has been a part of the Johnson Investment Counsel family since 1989, and is currently Vice President, Institutional Management in Cincinnati, Ohio. He holds the Chartered Financial Analyst (CFA) designation. He lives in Anderson Township with his wife Jenni.

> 513.661.3100

### **Education:**

Miami University, B.S. Finance & Economics

### **Community Involvement:**

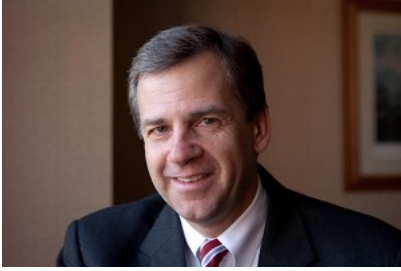
Christian Benevolent Association Foundation,  
Board Chair  
Finance Committee Chair  
Mason Christian Village,  
Board Member  
Parkside Christian Church,  
Elder

### **Memberships & Affiliations:**

CFA Society Cincinnati, Past President



## My Story:



A fifth grade math teacher who inspired his students to reach higher, a baseball coach who focused on the game's finer points, and a high school English teacher with a gift for encouragement – these were among Dale Coates' key influencers.

The first was Mr. Holtkamp. "He started the basketball team at Mariemont Elementary. Everybody made the team. No cuts. So we ended up with four teams. He wanted everyone who wanted to play to enjoy the game.

"As a teacher, he made math fun. He created math games and pushed you to do your best, in an encouraging way. He taught me how it could be fun to learn and why we should try to get better at things where perhaps we don't have much confidence. I learned fear of failing is OK as long as it doesn't keep you from trying."

Mr. Schreckenoffer was a milkman and a Cincinnati Knothole Baseball coach. Dale remembers him as disciplined but fair. "We worked a lot. He did more drills than the other coaches. For instance, it wasn't just about batting practice. He'd pull you aside and work on aspects of your swing. And he taught me, as a centerfielder, that it's not enough to just catch the ball – you've got to catch it on the run, moving in the direction you're going to throw so you have that extra momentum.

"We got to be really good. Ended up third place in the city in our last year with him, losing by one run to the team that was champion. We played our final game in Riverfront Stadium. I was 14 that year. It was the peak of my baseball career. We were never as good as a high school team as we were under Mr. Schreckenoffer."

Mr. Mahan was nothing like Dale. He was more of a writer, a reader. Dale's compass is pointed more to science and math. "But he understood who I was. He helped me take my best skills and broaden them. He helped make me better as a writer.

"When it was time to look at colleges, he suggested Miami because they have a good business program. He figured I was going to be a businessperson, and he was right. He gave me the confidence Miami would be the right fit for me, again, because he understood who I was. I could tell he cared, even though we were so different."

Dale also sees differences between him and his wife, Jenni. He's an introvert, she's an extrovert. "But the right amount of extrovert – she makes people laugh." Their sons, Alex and Erich, are grown, so Dale and Jenni are looking into pursuits they couldn't do bringing up the boys. One such pursuit was a mission trip to Haiti.

"The people were smart, friendly, content. It was a blessing to us, seeing their joy and the smiles on their faces. It was my first trip to a Third World country. I met several men who, I'm convinced, had they been born in America would be highly successful leaders here.

"Jenni and I have been so blessed. It's one thing to write a check, and we do that. But we want to put our hands into the process, too."