

Investing in the Future

by: **Ben Jones Jr.**

"I am excited to be building my own future," says Harold Callais, Managing Director and Chief Investment Officer for Callais Capital Management, LLC. Callais, originally from Galliano, moved to Houma during high school, and then to Thibodaux while attending Nicholls State University where he earned a Bachelor's Degree in Finance as well as additional professional education related to investment management. While attending classes at Nicholls, Callais met his wife, Kristen. They decided Thibodaux was the best place for them to raise a family.

Callais' favorite thing about living in Thibodaux is being part of a small tight-knit community has a strong sense of family values. "We are close enough to New Orleans, Baton Rouge, and Lafayette to make a day trip, but still have enough distance to avoid traffic and big city crime." Callais also likes the fact that it's a college community. "Programs and student involvement from Nicholls has a positive spillover effect into the community. Nicholls attracts cultural events, highly educated workers, and business investment; which in turn has increased the economic strength of Thibodaux."

Having his own firm has always been in the back of Callais' mind. "Growing up around my grandfather, and father's businesses, I was exposed to what it meant to own and run a business." Once Callais saw the opportunity, he quickly acted to launch Callais Capital. "In designing the business, the goal was to build a platform which allowed for both decision-making flexibility and aligned my investor's incentives with mine. In the end, the business model adopted by Callais Capital, places my investors in a position to benefit when I do and has an efficient decision-making process."

Callais enjoys focusing on his strengths and having the flexibility to quickly act on opportunities. Through its' offerings, Callais Capital is poised to invest in both publicly traded securities as well as privately held businesses. "A key part of the business is the administrative and strategic support I have from my partners," said Callais'. With his father, Corey J Callais and his brother, Nicholas P Callais, Callais Capital is a partnership he views as the continuance of his family's business legacy.

Every day is different at Callais Capital. "Typically I start the day by reading overnight news, doing some administrative tasks, and checking portfolio profit and

loss," said Callais. "The administrative duties don't take up much time, but reading and position monitoring is ongoing. Besides these tasks, I prioritize my time and focus on completing projects, conducting research, and reviewing investment opportunities." Each investment Callais makes is unique and requires different oversight and management. "This is what defines my style of investing and money management." Currently, Callais manages three portfolios and is also on the Investment Committee for United Community Bank.

Prior to launching Callais Capital, Callais was presented with a few attractive job offers. One of which was to move his family to a larger city, to work for a large investment bank. The second opportunity was closer to home and to be partner in a reputable financial advising business. "After looking at all aspects of the offers and discussing it with my wife, it was obvious what I had to do," said Callais. "In order to do what I wanted and live where we wanted I needed to start my own firm."

Outside of working at Callais Capital, Callais' number one priority is his family. "I love coaching my daughter's soccer team and watching her play volleyball," said Callais. "I also love to play games with my boys, take my kids to community events, take them skiing, and take them to the beach. My wife and I prefer to bring our kids with us wherever we go, and Thibodaux is great in supporting this." Callais' wife, Kristen, is a CASA, Pro-Life Advocate and speaker and Callais, himself, is on the Board of Directors for Nicholls Alumni Federation, a member of the Thibodaux Chamber of Commerce, a member of the National Association for Business Economics, and a member of the Hedge Fund Association.

Being from a large, and active family, the Callais's are always on the go. "Not a week goes by without a birthday celebration, wedding, award ceremony, dance recital, etc.

We have strong beliefs in volunteering and giving back. So when we can, we advocate for causes and volunteer."

Being a new member to the Thibodaux Chamber of Commerce, Callais enjoys the networking events especially Business After Hours. "The connections to other local businesses through the Chamber is invaluable," said Callais.

Callais is a man excited about the opportunities presented to him to build and invest in his future. By starting Callais Capital Management, LLC, Callais has opened up numerous doors to helping those in Thibodaux, as well as showing his children the meaning of being a part of a small-town and staying local.

