



# OAKTREE

## INDIVIDUAL PERFORMANCE GOALS

STAFF MEMBER NAME: Wade Covelli MANAGER(S): Dana Moolani

TITLE: Analyst DEPARTMENT: Accounting

EVALUATION YEAR / PERIOD: 2018 SUB-DEPARTMENT: Closed-End Fund Accounting

### INSTRUCTIONS:

- DISCUSS WITH YOUR MANAGER AND DOCUMENT THE AGREED UPON GOALS
- CREATE UP TO SIX (6) GOALS IN TOTAL
- ENSURE GOALS ARE SMART (SPECIFIC, MEASURABLE, ACHIEVABLE, RESULTS-ORIENTED, AND TIME-BASED)
- SUBMIT TO STEPHANI SCHMIDT IN HR AT [sschmidt@oaktreecapital.com](mailto:sschmidt@oaktreecapital.com)

PERFORMANCE GOALS		
GOAL	GOAL CATEGORY: STRATEGIC, FINANCIAL, OPERATIONAL, PEOPLE	BY WHEN OR HOW OFTEN?
1. INCREASE CE-MCR PRODUCTIVITY DURING DAILY WORKFLOW AND ALSO DURING PERIODS OF TEAM MEMBER ABSENCE BY ASSISTING WITH MORE COMPLEX REQUESTS THAT TYPICALLY REQUIRE MANAGER OVERSIGHT, THROUGH SHADOWING AND DISCUSSING REQUESTS IN DEPTH.	STRATEGIC-OPERATIONAL	ONGOING
2. FURTHER DEVELOP SOFT SKILLS BY STRENGTHEN RELATIONSHIPS WITH TEAMS THAT CE-MCR DEALS WITH DIRECTLY ON A DAILY BASIS, NAMELY CLIENT SERVICES. WHILE CONTINUING TO MAINTAIN RELATIONSHIPS WITH MEMBERS OF THE CE-ACCOUNTING DEPARTMENT. <ul style="list-style-type: none"> <li>MEETING WITH MANAGERS AND FA'S ALIKE TO INSURE CLEAR LINES OF COMMUNICATION ARE WITHHELD THROUGHOUT THE ENTIRE YEAR.</li> </ul>	PEOPLE	ONE MEETING/ CONVERSATION PER MONTH
3. CONTINUE TO INCREASE PARTNERSHIP ACCOUNTING KNOWLEDGE AND FURTHER MY UNDERSTANDING OF THE FINANCIAL STATEMENTS, MMR'S, AND LPA'S BY DISCUSSING ACCOUNTING CONCEPTS WITH MY MANAGER AND OTHER ACCOUNT MANAGERS.	STRATEGIC-OPERATIONAL	ONGOING
4. BUILD STRONGER GENERAL KNOWLEDGE OF OAKTREE AS A COMPANY, AS WELL AS SHARED COMPANY INFORMATION, THROUGH REVIEWING UPCOMING AND ARCHIVED COURSES FROM OAKTREE UNIVERSITY.	OPERATIONAL	ONE COURSE PER MONTH
5. DEVELOP ADDITIONAL TRAINING TO SUPPORT AND ADVANCE THE KNOWLEDGE OF CS TEAMS WHO ARE RELIANT ON CE-MCR FOR CERTAIN CLIENT INQUIRES. TO BUILD MORE SELF-SUFFICIENT TEAMS AS WELL AS EXPEDITE TURNAROUND TIME.	OPERATIONAL	ONGOING



OAKTREE

STAFF MEMBER APPROVAL

\_\_\_\_WC\_\_\_\_  
(TYPE INITIALS)

\_\_\_\_1/8/18\_\_\_\_  
DATE

MANAGER APPROVAL

\_\_\_\_DM\_\_\_\_  
(TYPE INITIALS)

\_\_\_\_1/18/18\_\_\_\_  
DATE