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LESLIE RUDD INVESTMENT COMPANY

VICE PRESIDENT - INVESTMENTS

THE COMPANY

Our client, **LRIco Services, LLC** (d/b/a Leslie Rudd Investment Company) is a privately held company that includes a diverse investment portfolio of business enterprises in various industries, real estate, marketable securities and other investments. **LRIco** is proud to be headquartered in Wichita, KS with personnel also located in Lenexa, KS, Dallas, TX and Napa, CA. Operating companies include:

- **LRIco Services, LLC** –Organizational service team providing shared services (e.g., Accounting, Tax, Legal, HR, IT, etc.) to the portfolio.
- **Standard Beverage Corporation -** Largest wholesale alcohol distributor in the state of Kansas, with an enviable brand portfolio including spirits, wine and beer.
- **Rudd Properties** – Real estate investment and property management firm with a geographic emphasis in Northern California, Texas and Kansas, which includes numerous properties of all real estate classes except single-family residential.
- **Rudd Foundation** - Established in 1998 to honor the Midwestern values that Leslie Rudd believed were instrumental in his development and success in business, community, and family. The Foundation gives back in meaningful ways to help both people and organizations who possess the initiative and determination to achieve their goals and thereby make a positive impact for those around them. One of the Foundation's primary areas of focus is its Rudd Scholars program, which provides 4-year full-ride college scholarships, covering all tuition, fees, books and housing to Kansas high school graduates who demonstrate grit, and possess the initiative to strive to achieve their goals and positively impact those around them.

- **Maverick Beverage Company -** A group of fine wine and spirits distributors that operates in multiple states (Texas, Colorado, Arizona Florida, Illinois and Minnesota) with its corporate headquarters in the Dallas Fort-Worth area. This group of businesses focuses on representing small/mid-size wineries and distilleries who are underserved by major distributors in key geographic markets.

- **Cities West Media, LLC –** A successful publishing and events company based in Scottsdale, AZ with top-selling titles that include Phoenix Home & Garden and Phoenix Magazine**.**
- **Other Operating Businesses** – Other operating companies within the Rudd portfolio include those in the areas of fine dining and luxury wine.

In addition, the LRIco portfolio includes a significant number of other investments including a material portfolio of passive investments. All together, these companies employ more than 1,000 employees. The LRIco team consists of 30 professionals engaged in managing the portfolio and the Rudd Foundation team has expanded to 6 full-time employees.

The LRIco portfolio also includes management of a number of family trusts, which hold these investments and ownership interests in the portfolio businesses.

The company is seeking a top-flight, agile, investment professional with diverse asset class expertise who is ready to learn and contribute to LRIco's continued growth and success.

THE OPPORTUNITY

This Vice President – Investments position represents an opportunity to join a family office investment team and make a big impact with decision-making influence with the leadership teams of the family office and Rudd Foundation. This is a performance-focused investment manager role (aligned and incented to achieve appropriate short and long-term investment returns), which provides the charitable foundation arm the stability to pursue its philanthropic mission. All this to be accomplished as a member of a team of dedicated and diverse professionals who believe in working hard to achieve performance excellence, yet also maintaining a healthy work-life balance.

This opportunity requires an analytically strong team member who possesses excellent communication skills and desires to be part of a relatively small, fast-paced group which focuses on driving results while also challenging each other, and the overall organization to continually improve. The successful candidate is expected to work on a variety of investment, analytical, project, and other activities, given the evolution, complexity and anticipated continued growth of the portfolio. This investment leader will work closely with the Chief Financial Officer, the Vice President – Finance, as well interact frequently with other LRIco executives (including the President, Trustees and Finance Committee of the Rudd Foundation).

Key Responsibilities include, but are not limited to:

- Participate in and advocate for portfolio design and allocation philosophy and execution.
- Establish standards for, and monitor and review, third-party investment manager performance.
- Source and evaluate new investment opportunities including screening, diligence, analytical analysis, and advocate for specific investment ideas.
- Monitor existing investments, identify key findings and insights, and report performance to leadership.
- Interface directly with third party investment managers as well as internal operating business leaders.
- Contribute to the establishment of common practices, tools, and templates for portfolio and project management, and ensure adherence to company and legal standards.
- Participate in the preparation of quarterly and annual reporting to Trustees and Beneficiaries of the related family trusts.
- Growing responsibilities, based on portfolio evolution and priorities, as well as individual's demonstrated skills and performance.

DESIRED CORE COMPETENCIES

- Action oriented with a strong work ethic – bias for action; energetic and hard-working.
- Adaptability – Able to deal with fluid situations and realignment of priorities in a professional manner. Willingness and the ability to "juggle' various assignments/projects will be important.
- Financial process management and analytical skills – Extremely good at assessing, developing, and implementing ways to get things done. Should be well-skilled in spreadsheet analysis and other financial tools.

- Teamwork – Focus on working well with others to accomplish objectives, while balancing the needs/priorities of multiple organizations.
- Results Focused – Someone who is hands-on, yet can think strategically/big picture, "gets stuff done," and is bottom-line focused.
- Relatable – Possesses the ability to explain complex investment topics in a consumable manner, without relying solely on capital markets jargon or "investment speak."
- Driver – Someone who is a self-starter with a high level of energy and initiative.
- Communication – Able to think on one's feet, communicate succinctly, and engage in vigorous, open debate in a professional manner with others who enjoy challenging each other to get to the "best answer."

PERSONAL CHARACTERISTICS

- The individual must be agile and comfortable with interacting verbally and in writing with numerous individuals with different personality profiles.
- Process-oriented, yet flexible; deals well with ambiguity and demonstrates adaptability.
- A hybrid executive that can think strategically and act tactically.
- Must possess courage of conviction and is able to professionally justify an opinion or position to others – a solutions provider.
- Intellectual "horsepower" - must be able to interact on macro investment company issues as well as detailed specific discussions with LRIco leaders on a day-by-day basis.
- Confident and mature communication abilities with executive presence.
- Focused and engaged in building a positive work environment. Should naturally encourage cooperation and collaboration with team members.
- A high level of integrity, honesty and professionalism.
- Ability to travel, as needed.

EDUCATION & EXPERIENCE

- Bachelor's degree in Finance, Economics, or related field
- Seven or more (ideally 10+ years) of progressively responsible experience in institutional investment management with broad asset classes, including private assets.

- Professional certification as a Chartered Financial Analyst, Chartered Alternative Assets Analyst or, progress towards such designations, is highly preferred.
- Knowledge of securities, insurance and mutual fund industries.

COMPENSATION

Compensation is negotiable and market-based corresponding to the candidate's experience and includes a competitive salary and annual performance bonus package, supplemented by a benefits package consisting of major medical, dental, life, and disability insurance plus a 401(k) program, etc. Relocation assistance is available if necessary.

LOCATION Dallas, TX ● Wichita, KS ● Lenexa, KS

Geographically, this position will be located in either Dallas, Texas; Wichita, Kansas - the largest city in Kansas; or Lenexa, Kansas, a thriving suburb of Kansas City.

The Dallas-Fort Worth metroplex the most populous metropolitan area in Texas and the fourth-most populous metropolitan area in the United States. The metroplex hosts 23 Fortune 500 companies, the second-most in Texas and fourth-most in the country. The Dallas-Fort Worth International Airport is one of the busiest airports in the country but offers direct flight service to a large number of locations. The metroplex's arts, culture, dining, and sports and entertainment scene is renowned.

- Welcome to the City of Dallas, Texas (dallascityhall.com)
- Dallas Chamber of Commerce
- City of Dallas Office of Economic Development | Official Website
- Dallas Morning News

The Wichita metropolitan area is represented by a broad population center of 635,000 people that provides exceptional quality of life (e.g., short commutes, superb schools, affordable housing, etc.).

Wichita is nationally recognized as one of the aerospace capitals of the world and is further known as one of the best entrepreneurial markets in the United States. As a hub of U.S. aircraft production, Wichita became known as "The Air Capital of the World" in the 1930s. Spirit AeroSystems (Boeing), Cessna, Airbus, Learjet and Beechcraft all have a significant presence in Wichita. Koch Industries, the second largest privately held company in the United States, is headquartered in Wichita.

- City of Wichita, Kansas
- Wichita Chamber of Commerce
- Greater Wichita Economic Development Coalition
- Wichita State University

Lenexa, Kansas, is a suburb of the Greater Kansas City metropolitan region. This community of 60,000 strikes the perfect balance between modern amenities and a tight-knit community. It offers a diverse economy, picturesque parks, an extensive trail system, highly ranked public schools, and vibrant community events that cater to individuals and families alike. With Kansas City just a stone's throw away, residents can enjoy easy access to world-class dining, shopping, major league sports, and other entertainment options available in a region of two million people. More information about Lenexa and the Kansas City region can be found at:

- Lenexa Convention and Visitors Bureau
- Visit Kansas City
- Welcome to Kansas City Video
- Johnson County Community College

APPLICATION PROCESS

CBIZ EFL Associates, an executive search firm, is assisting LRIco with this important search. All calls and inquiries should be made through the search firm. Nominations and applications will be held in confidence. Review of applications will begin immediately and will continue until the position is filled.

NON-DISCRIMINATION

Our client and CBIZ EFL Associates firmly support the principle and philosophy of equal opportunity for all individuals, regardless of age, race, gender, creed, national origin, disability, veteran status or any other protected category pursuant to applicable federal, state or local law.

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