



Company Name

 SLIDECKLY

# Agenda

- Firm Overview
- Process Overview
- Firm Philosophy and Process
- A systematic, flexible approach
- Benefits of Partnering with Slideckly LLC
- Women Executives
- Sample Position Description
- Sample Assignments
- Biographies
- Partial Client List
- Terms and Fee Schedule
- References
- Contact Us





# Firm Overview

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# Process Overview



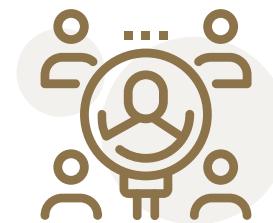
## Client-Centric

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## Results-Driven

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## Research-Oriented

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# Firm Philosophy and Process

## Experienced

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## Partnership

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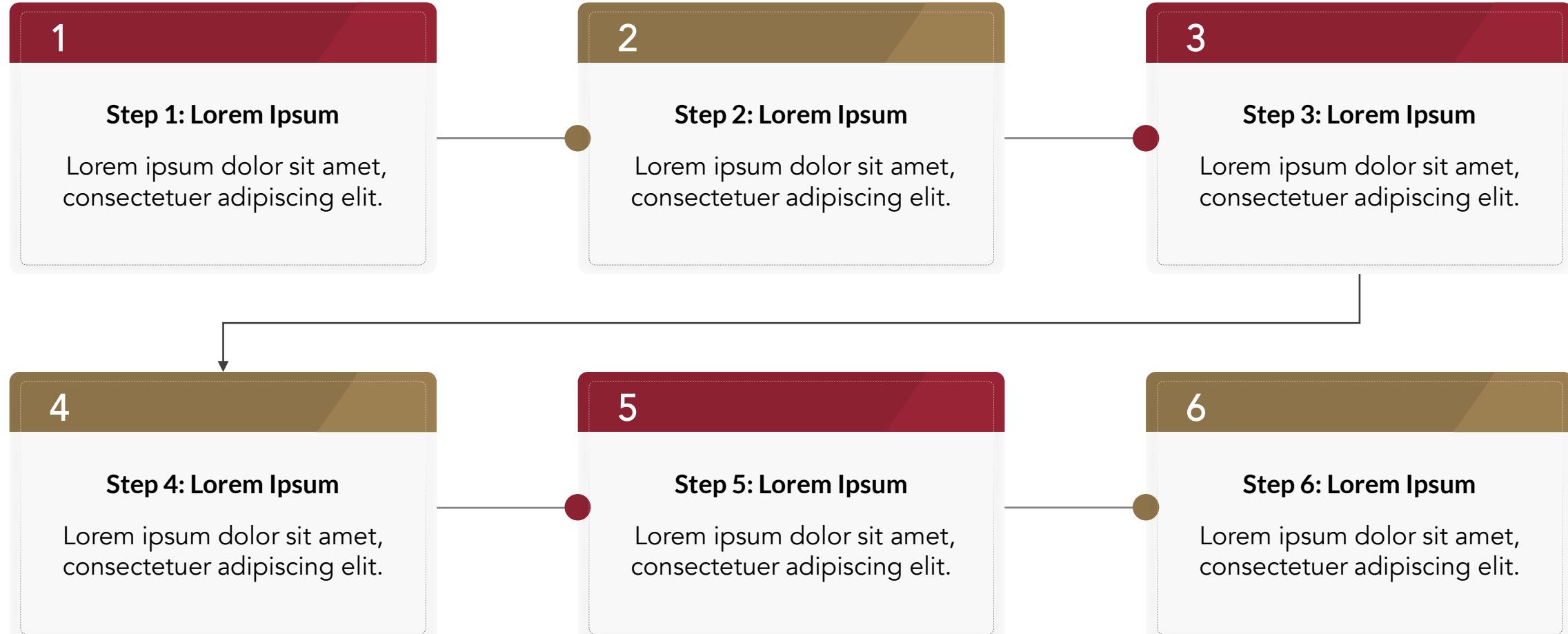
## Research-Driven, Client Centric

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## Selectivity

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# A systematic, flexible approach





# Benefits of Partnering with The Kinlin Company



## Specialization

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## Diversity

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## Staff Stability

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## Few Barriers

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## Personal Service

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## Accountability

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# Women Executives

We identify, support, recognize and track the careers of the most prominent Women Executives in Financial Services.

Our intent is to build a network and community of experienced executives in an effort to advance Women's leadership in today's challenging economic environment.

We track women in the following functions:

- CEO/President/COO
- Chief investment Officer
- Portfolio Managers across traditional and alternative asset classes
- Key Executives in Distribution, Marketing, Client Service, Consultant Relations, Finance, Technology, Compliance and Human resources.





# Sample Assignments

## Distribution / Sales / Marketing

President – Broker/Dealer Division*	\$ 1,500,000
Global Chief of Sales, Marketing & Client Service-Institutional	\$ 3,000,000
COO, Retail Business	\$ 1,850,000
MD, Institutional Sales	\$ 1,500,000
President, Retirement Services	\$ 1,500,000
Chief Marketing Officer*	\$ 1,000,000
Partner, Institutional Sales-Hedge Funds	\$ 2,000,000
SVP, Head of Intermediary Sales	\$ 1,250,00
SVP, International Marketing*	\$ 600,000
Head, Institutional Business	\$ 2,500,000
Global Head of Product Development	\$ 2,000,000

## Investment Management

Senior Portfolio Manager, Large Cap Growth	\$ 1,000,000
Senior Portfolio Manager, High Yield	\$ 600,000
Team Leader, Growth Equities	\$ 3,000,000
CIO, Equity Division*	\$ 5,000,000
Group Head, Treasuries*	\$ 1,200,000
Senior Portfolio Manager, Small Cap Growth	\$ 1,500,000
CIO, Fixed Income	\$ 4,000,000
Sector Head, Bonds	\$ 950,000
Global Head of Research	\$ 3,000,000

\* - diverse candidate



# Sample Position Description



THE KINLIN COMPANY, INC.  
Global Executive Recruiting for Asset and Wealth Management

## CONFIDENTIAL POSITION DESCRIPTION Chief Executive Officer

### THE COMPANY:

Diamond Hill Investment Group, Inc. together with its subsidiaries, provides investment advisory and fund administration services in the United States. It sponsors, distributes, and offers investment advisory and related services to a range of clients, such as corporations, mutual funds, retirement plans, public pension funds, endowments, foundations, financial institutions and high net worth individuals. The company also provides fund administration services, including portfolio and regulatory compliance, treasury and financial oversight and general business management and governance of the mutual fund complex, as well as oversight of back-office service providers, such as the custodian, fund accountant, and transfer agent. The firm offers investment advisory services to third-party financial intermediaries comprising independent registered investment advisors, brokers, financial planners, and wealth advisers; and fund administration services primarily to mutual funds, institutional accounts, and private investment funds.

### GEOGRAPHY:

This position will be based in Columbus, Ohio.

### SPECIFIC JOB DESCRIPTION/RESPONSIBILITIES:

The Chief Executive Officer will be responsible to lead the continual assessment of the firm's vision, mission and strategy, and help assure an open, honest culture. Establish and lead an executive management team. Lead the ongoing development of the investment team and oversee and participate in staffing and capital allocation decisions.

Specific areas of activity and focus would include:

#### Firm/Business Management

- Direct the development of strategic planning initiatives, including strategic involvement with the Board and Planning Group

January 18, 2019

749 Main Street • Osterville, MA 02655  
Telephone (508) 420-1165 • Fax (508) 428-8525  
[www.kinlin.com](http://www.kinlin.com)

Confidential PD - Chief Executive Officer, Page 2

- Provide leadership in pursuing the vision and mission of the firm, while promoting and developing the internal culture of the firm
- Provide direction for new initiatives on the business management side of the business working closely with the CFO
- Perform high-level human resources functions (e.g. conduct interviews, provide indirect supervision and perform performance evaluations for selected leadership positions, complete annual incentive compensation allocations, etc.)

#### Investment Management

- Provide overall leadership for new initiatives on the investment management side of the business
- Attend various investment meetings, providing input to staff or leading discussions on various topics
- Provide mentoring and development to the investment staff

#### Client Service and Business Development

- To participate in the service of select clients and new business opportunities
- Communicating with clients, shareholders, staff and board
  - To lead and participate in all client communications
  - To lead and participate with CFO in shareholder communications
  - To lead and participate with CFO in staff communications
  - To lead and participate with CFO in Board communications

Confidential PD - Chief Executive Officer, Page 3

### THE CANDIDATE:

The ideal candidate will be a sophisticated professional with the necessary leadership, investment acumen and interpersonal skills to be effective in this role. Additionally she/he must have the following:

- 20 or more years' experience in the investment industry in an analyst or portfolio manager role significant experience in non-investment positions may be considered toward this requirement
- Demonstrated success in investment leadership
- Demonstrated personal and professional success, honesty and integrity
- Extensive knowledge of investment management, specifically with the intrinsic value (Graham-Buffett-Munger) approach, with experience managing both equity and fixed income securities
- Experience in the development of corporate strategy
- Success in working with investment and other professionals, financial intermediaries, institutional and high-net-worth clients
- Self-motivated with an initiative and desire to succeed, and a strong focus on client service
- Would be helpful to have a working knowledge of the Investment Company/Advisors Acts of 1940 and the various related issues of industry compliance
- Strong verbal and written communications skills.
- Chartered Financial Analyst (CFA) designation (or equivalent) required
- MBA (or equivalent), or Bachelor degree in economics, investments, finance or related business discipline preferred

### COMPENSATION:

Compensation is commensurate with experience to include a base salary and subjective bonus tied to direct contribution as well as overall company/team performance. In addition, there is an outstanding and complete benefits package.

January 18, 2019

January 18, 2019

# Biographies



**John Doe**

**President and Founder**

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# Biographies



**Jane Doe**

**Senior Research Associate**

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**Jane Doe**

**Office Manager**

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# Biographies

## Jane Doe

### Executive Assistant

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## John Doe

### Public Relations/Journalist

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# Client List



The Global Investment Management  
Businesses of Prudential Financial, Inc.

next street

SSgA<sup>®</sup>  
STATE STREET GLOBAL ADVISORS

*William Blair*



KraftHeinz



# Terms and Fee Schedule

## Full-Search Traditional Search

### Time Frame

90-120 days

### Fee

1/3 of total first year's compensation or fixed fee arrangements are welcome. Expenses billed monthly.

### Terms

- 1/3 at onset of assignment
- 1/3 at 30 days
- 1/3 due at time of accepted offer, or when a mutually agreeable solution has been achieved.

*References available upon request*

## Unbundled Search

### Options

- Custom research and candidate development
- Scheduling, follow-up and feedback
- Reference checking
- Offer negotiations

### Fee

A fixed fee of approximately 20% of first year's total compensation will be negotiated and will be billed out in three equal increments.

### Terms

- 1/3 at onset of assignment.
- 1/3 at 30 days
- 1/3 at 60 days



# Terms and Fee Schedule

## Engagement support expenses

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## Additional candidate hires

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## Candidate leaves or terminates w/in 1 year

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## Internal/external candidate already in pipeline

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# References

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## A Company's Name Here

First and Last Name, President & CEO  
Phone Number: (123) 456-7890

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# Contact Us

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