MEET RICK WEDELL

RFG ADVISORY

CHIEF INVESTMENT OFFICER

A veteran institutional investor with 14 years of experience managing both debt and equity, Rick was most recently an Executive Vice President, Head of Fixed Income Consumer Investments and Assistant Portfolio Manager at Bain Capital Credit. He helped grow the firm to $30.4bn in assets under management. Rick is a market-tested leader—having managed through the volatile markets of 2001 and 2008 where he experienced firsthand the importance of portfolio diversification and the trade-offs between risk and return. He leads our Investment Team with the guiding principle of simple, straightforward analysis and investments —clarity of thought in a complex world.

BACKGROUND

Rick joined Bain Capital in 2001, where he quickly rose to Executive VP & Head of Consumer Investments. He consequently became Assistant Portfolio Manager for an $8 + bn leveraged fixed income portfolio. Rick is a Stanford School of Business Graduate with an MBA under the Henry Ford Scholarship. Before that, he earned a BS in Applied Mathematics/Economics, Magna Cum Laud from Harvard University.

INVESTMENT PHILOSOPHY

Our job is to manage your financial future prudently through thoughtful investments, well-diversified portfolios, and a thorough understanding of risk, as we pursue the goals of our clients for generations to come.

INVESTMENT PROCESS

Disciplined. Transparent. Proactive. Thoughtful. In the same way that we seek first to understand your goals before we discuss portfolio construction, we focus first on understanding the risk inherent in an investment or portfolio before we focus on potential returns. Our team works seamlessly with your Investment Advisor to tailor each portfolio to seek potential returns while addressing your investment needs and risk appetite.

YOUR FUTURE IS OUR PRIORITY

"Your personal goals—plus risk awareness and active reassessment—equals your investment portfolio."