



OUR FIRM

Kinzie Capital Partners is a Chicago-based private equity firm investing in lower middle market companies in the manufactured products, business services and consumer industries, focused on making control investments across the United States in companies with revenues up to \$250M and EBITDA up to \$15M. Whether companies are navigating a generational shift, a fast-moving period of high growth or complexity in an industry or business cycle, Kinzie seeks to create lasting, positive outcomes by focusing on operational excellence and leveraging technological innovation through our key operating partners to drive longevity and growth.

OUR BACKGROUND

Kinzie was founded in 2017 by Suzanne Yoon, who serves as Founder & Managing Partner, and David Namkung, who serves as Co-Founder & Partner, Head of Portfolio Operations. Both Suzanne and David lead the firm with a focus on critical thinking, excellence and continuous learning.

OUR TEAM

At Kinzie, we believe in fostering a spirit of teamwork across the organization. True partnerships are created when participants bring skills and expertise to the relationship and understand how to approach each situation with a fresh approach and for the greater good of the organization. We drive value for our companies and stakeholders by attracting and retaining exceptional, diverse, hard-working professionals to contribute to our overall success.

OUR MISSION

To generate excellent investment returns, creating value for all stakeholders and our communities.

OUR VALUES

Collaboration – Earnest collaboration with a common goal in mind builds stronger teams and solutions. Harnessing a cooperative and agile strategy gives us the power to collectively achieve more.

Connection – Building positive and lasting relationships drives the success of our business and communities. Our connections among people and organizations are vital and valued.

Diligence – From the investment process to operations, all projects receive the same steadfast commitment and thoughtfulness to the end—always.

Diversity – A diverse and inclusive culture is embodied from the top down. Utilizing each individual's unique strengths and perspectives amplifies our overall success as a team.

Innovation – At our core is an entrepreneurial spirit. Leveraging the power of technology, a creative mindset and broad vision allows us to discover new potential.

Integrity – A principled and considerate approach guides all of our actions. Integrity is fundamental to how we perform our work and treat our colleagues inside and outside the firm.

OUR COMMITMENT TO DIVERSITY, EQUITY AND INCLUSION

At Kinzie Capital Partners, diversity, equity and inclusion are rooted in our values. We believe they are integral elements of our competitive advantage. Each team member is evaluated and embraced for their individuality as well as their varying backgrounds and experiences. Our commitment to fairness, inclusivity and curiosity fosters cohesiveness allowing us to work extraordinarily well together. Not only do we have a broad range of experiences, but our culture is further enhanced by inviting a wide variety of interests. We believe this mosaic creates an optimal environment to uncover the most attractive investment opportunities to create long-term value for our investors and stakeholders.

OUR COMMUNITY

We believe in people who measure their lives by how much they do for others, and we promote the importance of giving back to the communities in which we live and work. Fostering a culture of helping charitable organizations achieve their goals is an aspect of our corporate culture of which our team is very proud. Kinzie and its professionals dedicate their time, resources and expertise to a wide range of worthy causes.

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Vice President, Finance & Accounting

As a valuable Kinzie employee, the Vice President, Finance & Accounting will assist the team by taking an active role in supporting the Finance & Operations team, which is dedicated to financial and compliance management as well as general operations. This role reports to the Founder & Managing Partner and works closely with the Director, Investor Relations & Operations as well as the Assistant Vice President, Finance & Investor Relations.

TEAM

The Finance & Operations team is comprised of two full-time individuals who work closely with various external partners in delivering accurate, timely and clear financial reporting and communications to investors, prospective investors, portfolio companies and third parties.

ROLE

The Vice President, Finance & Accounting is a dedicated, reliable and diligent team player who enjoys deadline driven work and executing with a high attention to detail. The Vice President, Finance & Accounting will thrive in a fast-paced, versatile environment and is expected to remain poised. Complex financial analysis, detailed tracking, discretion and excellent judgement are required. Motivation, collaboration and a willingness to go the extra mile are also a must.

The Vice President, Finance & Accounting will also function as a liaison to portfolio companies, internal colleagues and other external stakeholders by communicating timely, confidential information. In this role, all communications and are managed with a high degree of sensitivity, professionalism and of the utmost care.

The successful candidate possesses exceptional project management skills and highly anticipatory, a strong problem-solver and will have an immediate impact on the productivity of the department, firm and their portfolio companies. The Vice President, Finance & Accounting is mission driven, has an entrepreneurial mindset and is passionate about having a transformational impact on the firm and its investments.

RESPONSIBILITIES

- Run high performing finance and accounting functions through the employment of a dynamic, nuanced and decisive leadership style that stimulates employee engagement while driving results and reinforces a high-performance, collaborative culture
- Oversee all facets of the firm's financial responsibilities, spanning finance, treasury and tax
- Work closely with the investment team as it relates to the development and execution of financial reporting requirements, due diligence and other related functions
- Maintain strong controls and compliance standards in accordance with GAAP and SEC regulations and review all financial outputs of team members and third parties
- Support the compilation and budget monitoring process and related reporting
- Lead, create and monitor reporting of financial and other information for the firm and funds, including analysis, financial statement preparation and fund accounting and tax activities for multiple funds and related operating and holding companies
- Oversee cash management, including creating multi-tiered internal bank transfers for review and approval as well as cash account reconciliations
- Supervise third party administrators and middle/back-office service providers who are responsible for reporting investment valuations, cash reconciliations and month- and quarter-end net assets

- Reconcile balance sheet and general ledger account
- Manage debt facility/line of credit, including borrowings, repayments, prefundings, interest calculations, reporting to lenders, liquidity analysis, daily/weekly reporting and ad hoc analysis
- Coordinate annual audit preparation and oversee audit firm work
- Compile data for quarterly closing, oversee process and deliver quarterly and annual investor reports, distribution notices, etc.
- Assist in the review and manage the preparation of valuations, quarterly and annual financial statements and partner packages, including all supporting work papers and disclosure documents with the assistance of third parties
- Participate in tax management and tax planning of the holding companies and their investments and the tax planning of affiliates
- Compute partner allocations, produce capital account statements and distribute investor notices
- Manage calculations for different activities and processes including management fees, capital contributions, distribution waterfalls, carried interest, etc.
- Ensure investor allocations and fee calculations are accurate and up-to-date
- Negotiate contracts for the firm and portfolio companies as required
- Understand partnership agreements and interpret reporting requirements and partner economics
- Provide external facing financial leadership
- Coordinate investor and other presentations and materials as needed
- Assist with accounting functions and programs such as payroll, expense management, etc.
- Contribute to the development of new or amended accounting systems, programs and practices
- Liaise with deal team and internal and external parties to encourage operational efficiencies and firmwide compliance procedures
- Write, update and/or improve operating procedures as needed and/or recommended
- Handle projects associated to requests/inquiries from investors, auditors and other third parties or as specified in the investor documents
- Perform special projects and presentations for the Managing Partner, senior management, investment team or other constituents

REQUIREMENTS OR EQUIVALENT EXPERIENCE

- BS/BA degree in business or related field, CPA strongly preferred
- 8-10 years of advanced financial analysis, planning and budget controls, tax required; financial consulting and/or transactional advisory services background a plus
- Strong accounting and operations skills, including systems/technology skills and proficient or excellent in Microsoft® Office Suite (Outlook, Word, Excel and PowerPoint)
- Exceptional project management and organizational skills with a proven ability to multi-task
- Demonstrated success in managing people and projects
- Detail oriented and a self-starter in a fast-paced environment
- Strong interpersonal skills, written and verbal communication skills
- Excellent problem solving and analytical abilities
- Commitment to teamwork and ability to coordinate across multiple business functions
- As a condition of employment, Kinzie requires all employees to be fully vaccinated and boosted for COVID-19 prior to starting work

ATTRIBUTES OF SUCCESS

- **Excellence**
Competitive drive to achieve and win
- **Agility**
Adaptability in the workplace and in an everchanging world
- **Critical Thinking**
Ability to reason and make data-based decisions regarding complex matters
- **Emotional Maturity**
Awareness of one's strengths and weaknesses, humble presence and understanding of human nature
- **Collaboration**
A team-oriented mindset in all aspects of work
- **Courage**
Confidence to speak up and stand up for beliefs even when challenging
- **Resilience**
Ability to navigate stressful situations with grace
- **Positive**
Driven primarily by altruism
- **Entrepreneurial**
Prepared to do what others won't dare to do
- **Self-Determination**
Default to taking initiative to making continuous progress

EQUAL OPPORTUNITY EMPLOYER

Kinzie is strongly committed to creating and preserving equal opportunity for all employees and applicants. Kinzie makes all employment decisions including recruitment, hiring, compensation, training, promotion, transfer, discipline, termination and other personnel matters without regard to race, color, ancestry, religion, sex, national origin, age, disability, military status, marital status, sexual orientation, genetic information, citizenship, gender identity, parental status or other legally protected characteristics or conduct. Kinzie's dedicated commitment to equal opportunity requires the same commitment by each individual employee.