

# Red Cedar Investment Management Firm Overview

## ABOUT US

- Institutional, active asset management firm
- Formed in 2014, we have 17 employees and manage \$1.7B\* in AUM
- Majority owned by employee group
- Focused on income producing strategies through research across the capital structure
- Located in Grand Rapids, MI, (HQ) and Cincinnati, OH.

## PHILOSOPHY

We believe that a rigorous, fundamental investment process, which focuses on the most attractive securities in the income universe, can help produce improved risk-adjusted returns for clients. Further, we believe that income is the primary driver of fixed income returns over time and that superior performance can be achieved by finding cheap cash flows via a fundamental value approach.

## LEADERSHIP TEAM

**John Cassady III, CFA**  
Chief Executive Officer,  
Managing Partner

**David Withrow, CFA**  
President,  
Managing Partner

**Michael Feldhaus**  
Director of Sales and Marketing,  
Managing Partner

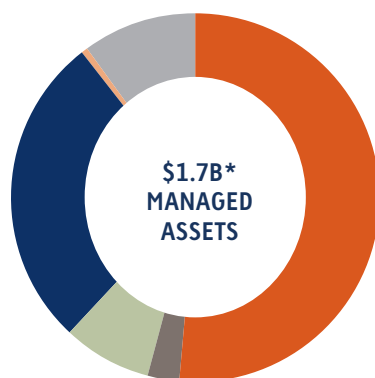
## CONTACT US

**Main office**  
333 Bridge Street NW,  
Suite 601  
Grand Rapids, MI  
49504  
616 226 3139

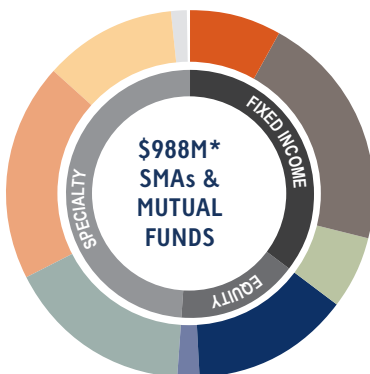
[REDCEDARIM.COM](http://REDCEDARIM.COM)

**Cincinnati office**  
1404 Vine Street,  
2nd Floor  
Cincinnati, OH 45202  
513 345 4414

## OUR MARKETS



Insurance	\$884.4M
Corporation	\$48.7M
Foundation	\$134.4M
ERISA	\$471.2M
Religious Entities	\$8.5M
Other	\$170.3M



Core Plus Fixed Income	\$82.3M
Core Fixed Income	\$204.8M
Short Term Bond	\$62.8M
Dividend Growth	\$138.3M
Dividend Growth Premium Income	\$19.2M
Strategic Income	\$162.4M
Liability-Driven Investing	\$187.4M
Preferred & Income Securities	\$114.9M
Tax-Advantaged Preferred Securities	\$0.3M
Red Cedar SRI, LP	\$16.0M

## OUR TENURED TEAM OF INVESTMENT PROFESSIONALS

### Investment

**John Cassady III, CFA**  
Co-Chief Investment Officer, Managing Partner

**David Withrow, CFA**  
Senior Market Strategist, Managing Partner

**Jason Schwartz, CFA**  
Director of Portfolio Management, Partner

**Brandon Bajema, CFA, CPA**  
Co-Chief Investment Officer, Partner

**Julia Batchenko, CFA**  
Senior Portfolio Manager, Partner

**Mitchell Stapley, CFA**  
Director of Macro Strategy

**Brad Filips**  
Credit Strategist

**Samantha Rusler, CFA**  
Portfolio Manager

**Charlette Golder**  
Investment Analyst

**Conor Davis**  
Investment Analyst

### Sales and Marketing

**Michael Feldhaus**  
Director of Sales and Marketing, Managing Partner

**Benjamin Tillson**  
Director of Business Development

**Grace VerHage**  
Sales and Marketing Associate

\*As of March 31, 2024.

Red Cedar Investment Management, LLC (RCIM) is an investment adviser registered under the Investment Advisers Act of 1940. Registration as an investment adviser does not imply any level of skill or training. The oral and written communications of an adviser provide you with information about which you determine to hire or retain an adviser. For more information please visit [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and search for our firm name.