

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

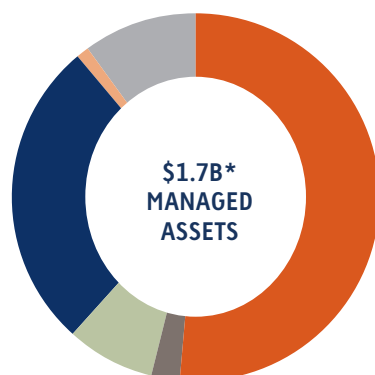
CONTACT US

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

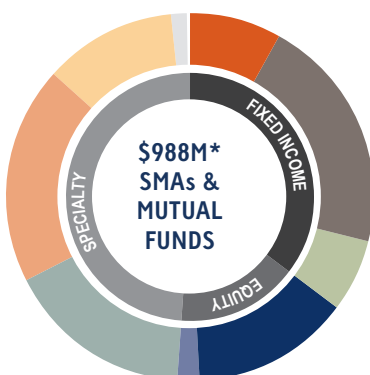
REDCEDARIM.COM

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

OUR MARKETS



Insurance	\$884.4M
Corporation	\$41.3M
Foundation	\$134.4M
ERISA	\$471.2M
Religious Entities	\$16.0M
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 and search for our firm name.