

## Job Description

### Position:

Director, Capital Markets

### Position Overview:

The individual will support the Capital Markets team, which is responsible for Rockbridge's fund formation, fund governance, and investor relations for existing and future investment platforms, which includes both private equity real estate and private operating company investments, including hospitality and non-hospitality targets. The Capital Markets team, in conjunction with senior management, is also responsible for underwriting, asset managing, and disposing of portfolio company investments in Rockbridge's private operating company investments. The individual will support capital raising and investor relations functions, including but not limited to, financial modeling and analysis, due diligence management, track record maintenance and review, investor reporting, industry research, and preparation of fundraising materials. In addition, the position will support senior management in their diligence efforts for and management of new and existing portfolio company investments.

### Key Responsibilities:

- Construct and maintain financial models for investment platforms and private equity investments
- Lead underwriting for the acquisition, asset management, and disposition of portfolio companies
- Work closely with other Rockbridge teams on many cross-functional projects, including senior executives
- Monitor and provide analytical support for existing funds' reporting requirements
- Provide analytical support for new strategic initiatives
- Oversee Rockbridge track record and market data to support team's due diligence management efforts for both existing and prospective investors
- Support the preparation of fundraising documents and communications, including analytical support and pitch book preparation
- Manage preparation of presentation materials for investor meetings, including underlying data analysis
- Provide analytical and written support for quarterly and annual reports among other investor initiatives and lead overall process
- Manage the team's preparation for board meetings and other management meetings including: preparation of analytical materials and presentations, creating lists of key issues or questions, and producing other support materials
- Support Rockbridge goal of continuous improvement by identifying and executing on opportunities for process and technological advancement

### Job Requirements:

- Entrepreneurial individual with a strong work ethic and a high-level of intellectual curiosity and integrity
- Flexible and adept at multi-tasking in a fast-paced, deadline-sensitive environment
- Strong analytical ability and attention to detail with an ability to lead transactional due diligence
- Advanced knowledge of Microsoft Excel and Microsoft PowerPoint
- Financial modeling including building full-financial statement models from scratch
- Demonstrated ability to organize and communicate information effectively in writing and interpersonal communications
- 5-7 years of experience in finance, accounting, capital markets, or private equity preferred  
MBA or CFA a plus but not required.

### Company Overview:

Headquartered in Columbus, Ohio, Rockbridge is a private equity real estate firm with a focus on hospitality investments. Rockbridge has formed and managed seven real estate funds over nearly twenty years. Since 2000, Rockbridge's team has invested in over 200 hotels in 38 states as part of over \$5 billion of transaction value. Bridgepoint Hospitality, an affiliate of Rockbridge, pursues off-market investments in hotel management companies. As of December 2017, Rockbridge had \$2.3 billion of assets under management.