

Private Equity Investments VP

Morgan Street Holdings is the holding company and investment arm for the HAVI Group of businesses, including HAVI Supply Chain, tms, and Stanley. Built on the philosophy of always "delivering the promise", we have a 50-year history of deep customer relationships and employee growth. Morgan Street is growth-oriented with a focus on investing in, owning and supporting great companies. We are privately held by our operating partners and are investing our own capital which is driven from the cash flows and balance sheets of our businesses.

The mandate of Morgan Street is twofold. We are actively looking to invest in and acquire companies that share our approach to business and can be part of our group for the long term. We are also making meaningful and strategic Limited Partnership investments in private equity firms and family offices that share our values and invest in companies aligned with our interests. As part of our strategy, we are looking to build strong and mutually beneficial relationships with these firms to enable Morgan Street to bring value to the funds as well help expand our investment opportunities and build our pipeline and awareness of potential acquisition opportunities.

As part of our evolution and expansion we are actively looking to grow our team and are looking to hire a Private Equity Investments VP to help develop and execute our strategy for deploying more than \$1 billion of capital into Private Equity Funds and co-invest opportunities. Responsibilities will include market research to develop a broad pipeline of opportunities, leading initial and ongoing diligence of funds, participating in investment decisions, monitoring and reporting on investment performance and building deep relationships across the industry and with our partners.

Role Responsibilities

PE Pipeline Development & Opportunity Origination

- Using your industry knowledge and other resources, identify, prioritize, track and develop relationships with PE funds or family offices for investment opportunity consideration.
- Help create and maintain a database of relevant Funds including performance, timing of fundraise, sector focus, relevant portfolio companies, partners, etc.
- Connect with other Funds, Family offices or Placement Agents to share MS story and generate opportunities for our platform.

Fund Manager Due Diligence & Underwriting

- Lead initial and ongoing fund manager underwriting & due diligence processes including meeting with fund leadership, performing quantitative and qualitative analysis of the funds performance and team and leading external reference checks.
- Build internal diligence reports, presentations and recommendations that clearly and succinctly communicate the risks and opportunities of an investment in line with the MS Strategy
- Participate with the MS Partners in presenting final investment recommendations to our Investment Committee
- Review and negotiate investment documents to identify and clearly articulate important terms
- including fees, expenses, potential conflicts, risks, and liquidity provisions;

Relationship Management

- Build relationships and act as a liaison between Morgan Street Holdings and our Investment Partners to ensure ongoing communication and access to opportunities such as co-invest, joint ventures, passed deals, continuation vehicles, sales of portfolio companies, etc.
- Support PE Partners' engagement with Morgan Street and our portfolio companies' subject matter experts.
- Leverage PE relationships to identify other Bankers, Intermediaries, and business brokers that could support MS control-investment deal flow activities.
- Support Morgan Street's efforts to build our brand in the marketplace
- Keep apprised of relevant industry events or conferences relevant to Morgan Street.

Performance Tracking & Execution Management

- Monitor, track, and report on the performance of PE investments at the fund and portfolio company level
- Work with Morgan Street Finance and Operations teams to execute capital calls and document completion for fund investments.
- Track and monitor PE Portfolio companies and their progress, assess and help identify where and how MS could support and/or ultimately acquire those assets at the appropriate time.

Qualifications

Bachelor's Degree

- Deep knowledge of the Private Equity or Family office investment industry with at least 7-10 years of experience in Private Equity fund diligence.
- Preference for applicants with work experience at a single or multi-family office or pension funds, insurance companies, funds of funds, placement agents or similar where the role included significant private equity fund diligence.
- Excellent written and verbal communication skills, with the ability to present and defend recommendations to Morgan Street Partners and our Investment Committee and Advisory Board and stakeholders
- Demonstrated success in building relationships and enjoyment of relationship management.
- Excellent interpersonal skills, with the ability to collaborate effectively with team members and various stakeholders

Location and Work Expectations

This is a Chicago-based role in our new global headquarters (voted one of the most fantastic new offices in Chicago by Crains) at 345 N Morgan Street in the vibrant West Loop/Fulton Market neighborhood.

Compensation & Benefits

We offer a comprehensive and competitive compensation, bonus and benefits package as part of our total rewards philosophy.

Equal Opportunity Employer

We are an equal opportunity employer and we value diversity at our company. We do not discriminate based on race, religion, color, national origin, sex, gender, gender expression, sexual orientation, age, marital status, veteran status, or disability status. We will ensure that individuals with disabilities are provided reasonable accommodation to participate in the job application or interview process, to perform essential job functions, and to receive other benefits and privileges of employment. Please contact us to request accommodation.