Rick Wedell, Chief Investment Officer

RFG Advisory Awards

ThinkAdvisor LUMINARY 2021

Winner, *InvestmentNews* Best Places to Work for Financial Advisors 2021

Finalist, WealthManagement.com Industry Awards 2021 & 2020

Finalist, *InvestmentNews* Innovation Awards 2021

Financial Times Top 300 RIA 2020

Finalist, Money Management Institute/Barron's Industry Awards 2020

Academics Achievements

Harvard University, Magna Cum Laude, Applied Mathematics & Economics

Stanford Graduate School of Business MBA Awarded Henry Ford II Scholar

Rick Wedell joined RFG Advisory as Partner and Chief Investment Officer (CIO) in 2016. As CIO and leader of RFG's Investment Team, Rick manages multi-asset portfolios and provides strategic insights on asset allocation and portfolio construction. Rick also leads the design and enhancements of RFG's custom-built, institutional-caliber, client-focused investment platform known as "Bluemonte", currently managing over $3 billion of assets under management.

Rick's guiding principle is simple, straightforward analysis coupled with a consistent, rigorous investment process. Recognizing that foundations and family offices often enjoy a significantly higher level of access and sophistication around portfolio management, Rick designed an innovative investment experience focused on bringing that level of service and direct accessibility to financial advisors at RFG Advisory.

VETERAN INVESTOR/MARKET-TESTED LEADER

Before joining RFG, Rick spent 12 years at Bain Capital Credit, where he rose through the ranks to become Executive Vice President, Head of Fixed Income Consumer Investments, and Assistant Portfolio Manager. Rick played an instrumental role in helping Bain grow to become a global investment powerhouse, serving client assets in excess of $30 billion.

Managing portfolios through the volatile markets of 2001 and 2008, Rick experienced firsthand the importance of portfolio diversification and the trade-offs between risk and portfolio return. He applies those same lessons today to managing client and institutional portfolios at RFG Advisory.

2021 THINKADVISOR LUMINARY

Recently named a 2021 LUMINARY by ThinkAdvisor for Thought-Leadership & Education, Rick conducts client events, seminars, and workshops around the country and a bi-weekly series called Market Commentary with Rick Wedell on YouTube. From customized asset allocation recommendations to detailed investment analysis, he also works one-on-one with our Advisors and their clients to construct customized portfolios that help meet their defined goals.

Under Rick's leadership, RFG Advisory was named a Finalist for the InvestmentNews Innovation Awards 2021 and Best Places to Work for Financial Advisors, in addition to other industry accolades from Barron's, Financial Times, Money Management Institute, and WealthManagement.com.

Rick has an MBA from the Stanford Graduate School of Business, where he was awarded the Henry Ford II Scholar. He earned a B.A. in Applied Mathematics & Economics from Harvard University, Magna Cum Laude.

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