



Nashville, TN  
[invest@upholdings.com](mailto:invest@upholdings.com)

## About

Upholdings is a private wealth management firm advising 10+ entrepreneurial families across \$100 million of assets. In addition to managing their investments, we partner with clients in their entrepreneurial journeys to increase their odds of hitting it big over and over again. Example clients include former executives from Google, Apple, Everlane and Juul.

## Wealth Partner

In this role, you will support all activities within the firm.

- Join the founder in new and existing client development
- Monitor our existing investment portfolio and challenge our holdings
- Diligence new investment opportunities across private and public markets
- Onboard clients, primarily into Interactive Brokers
- Prepare for quarterly investment reviews with each client
- Travel 2-3x per year; clients are in Austin, Los Angeles, San Francisco, Seattle, and Jupiter

## Qualifications

See definition of “self-learner” in your favorite chatbot.

## Compensation

We can be competitive on salary across a range of experiences. We also have a 401k program and stock options. Our company has very ambitious growth targets, offering significant opportunities for career growth and equity participation.

## About the Founder

robert@upholdings.com | 615-669-8699

### UPHOLDINGS

2019 – Present  
Founder

- Mission: Bring sustainable financial achievement to real life investors
- Currently represent 10 families and businesses with more than \$100 million in assets; most are entrepreneurs on their 2<sup>nd</sup> business
- S&P-beating returns for 6 years inside the Compound Kings fund

### EVERLANE

2013 – 2018  
CFO

- Mission: Exceptional quality, ethical factories, radical transparency
- Helped build the team from 20 to 200+ employees, while scaling revenue 20x and achieving profitability
- Managed Finance, Planning, People, Data, Distribution, and CX teams
- Launched Wholesale and International revenue channels

Meru Capital  
2011 - 2012  
Analyst

- Supported a long/short fund of consumer and internet companies
- Key investments: Alibaba, Liberty Interactive, Trip Advisor

### ELEVATION

2006 - 2011  
Associate

- Supported a private equity fund by evaluating offline to online investment opportunities, primarily across internet and media
- Key investments: Palm, Facebook, Yelp, and MarketShare Partners



- Harvard '05 AB in Economics, cum laude
- Thesis: "Community Development Block Grant Program: Impact of Federal and Local Government Development Spending"