



CAREER INTERVIEW

Kathy Kozak, CFA

*Vice President Strategy and
Corporate Finance*

Trez Capital

Interview by
Sahar Sharafzadeh, CFA and
Albert Wong, CFA

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relationships.
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how long they last
and the level of
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in return.”**

Can you tell us a bit about your background?

I was born and raised in the Chicago area. After high school, I went to the University of Iowa, as it is one of the more popular schools in the area and my older sister attended there. I didn't know exactly what I wanted to do but I knew I wanted to be in business. My Dad was an accountant so I grew up exposed to the subject. I ended up taking accounting classes, it instantly clicked so I carried on in that field.

What was your first job when you started your career, and was it the position you had hoped for?

The big accounting firms do campus recruiting and Arthur Andersen, which was the biggest accounting firm in Chicago at the time, recruited me. I went back to Chicago to join their financial services practice on the tax side. All of my clients were alternative asset management firms such as hedge funds, fund of funds, and private equity. I found that I quite enjoyed the hedge fund world and I managed to work quite a bit in that area.

Did you follow a specific career path, change jobs within the same company, and what prompted any job changes?

During my time in public accounting I especially enjoyed working for a Chicago based client,

Grosvenor, a large fund of funds investment firm. My former manager at Arthur Andersen, who had moved over to Grosvenor, recruited me to join the firm. Grosvenor was in a very exciting place, poised for a growth and the team there was great. I was interested in the goal of becoming a Partner but the Partner-level work was more sales oriented and wasn't particularly attractive to me so I started at Grosvenor in a fund accounting role. I thought I'd eventually leave Grosvenor and move to a different firm once I got bored but I never actually did! There was always a new project or challenge that kept me interested. I was at Grosvenor for 18 years, and over that time I led the fund accounting team, audits, the tax department, financial reporting and investment reporting. I also ended up getting involved with the treasury team to build a foreign exchange hedging program, as well as the operational due diligence team. While on this team an opportunity arose for my husband to work in Vancouver so I was able to continue working with Grosvenor remotely from here and fell in love with the city. When I could no longer work remotely, the timing worked out for me to move over to Trez Capital where I am now the Vice President Strategy and Corporate Finance.

What advice would you give to someone who is starting his or her career?

Never say no to new opportunities and try learning from different roles and industries if you can. You can always go back to what you did previously but new roles provide opportunities for learning and development. Exercise your curiosity. When I'm looking to hire, I look for people who have a natural intellectual curiosity. Also, if you want to grow, make sure you communicate that to someone. There is no harm in asking for something you want.

What skills or qualities do you believe someone would need to have to succeed in your area of expertise?

You need to be good at juggling many things at a time. I oversee the financing with our partners which includes structuring financing, negotiations, documents, and managing relationships. My job is to keep different plates spinning and not letting them fall!



What impact has the CFA designation had on your career path?

It has been definitely favourable, especially in combination with obtaining my MBA, as it has broadened my skillset beyond accounting. Given that my prior education was focused on accounting, the CFA designation helped to plant my feet in finance.

What would a typical day look like for the position you currently hold? What do you enjoy most about your job?

I enjoy that no two days are the same in my role and I like not knowing exactly how the day is going to go! I enjoy that there is so much diversity with respect to what I work on and the people I work with. I am equally external facing and internal facing. I like the relationship management aspect of what I do, in addition to the financial aspect, because every loan and every partner is different which keeps my job interesting.

Did you encounter any major obstacles in your career path?

No not really! I was fortunate in the transition to Trez Capital – they were able to develop a role for me negating the necessity for them to do a

bigger, broader job search. The timing worked out great and I was able to communicate what I was looking for. Before I joined Trez Capital, no one was doing this role and the job functions were spread out across many individuals. Trez Capital was also poised for growth so they were looking to expand the area that I'm now working in.

Looking back on your career, what accomplishment(s) are you most proud of and why?

I am most proud of the wide variety of work I've done and the relationships I've developed over the years. Invest in your relationships. You'll be surprised how long they last and the level of support that you can offer and gain in return.

Did you have any mentors or sponsors throughout your career who helped you get to where you are? Do you have any advice for younger professionals who want to access a mentor but do not know where to start?

Absolutely - the former CFO of Grosvenor has always been an incredible mentor and friend. His way of leading the firm and managing the department was inspirational and he was a great role model for me with respect to how to

get things done, how to treat people, and how to develop a team. I would recommend for those looking for mentorship to go out there and ask for it. Ask to set up a meeting for coffee or lunch. Most people are willing to help as long as you ask for it.

How do you develop yourself outside of work? Are you involved with any organizations or extracurriculars?

I am involved with Women in Capital Markets (WCM). I live in Squamish so I love the outdoors – hiking, skiing, trail running and spending time with my family.

What advice (not just career but any advice) would you have for your 20 year old self?

Keep learning and trying new things; you can always try something else if you don't like it. Don't settle for doing something that you are not happy with!

