

About Us

Broadleaf Partners, LLC is an asset management firm based in Hudson, Ohio. The firm is focused on achieving superior investment returns and providing outstanding client service. Doug MacKay and Jeff Travis, founders of the firm, have over twenty-nine years of combined experience managing individual, institutional, and mutual fund portfolios.



Doug MacKay, CFA

Doug is the chief executive officer, and chief investment officer of Broadleaf Partners, LLC. He is responsible for setting the overall investment strategy of the firm. Doug graduated from Miami University, holds an MBA from Case Western Reserve University and has over eighteen years of investment and management experience. He is a member of Hudson Community Chapel where he is a Sunday School teacher. Doug is also an Eagle Scout, President of the Alzheimer's Association and is an avid runner, cyclist and skier. Doug and his wife, Lisa, have three children.



Jeff Travis, CFA

Jeff is the chief operating officer and director of research for Broadleaf Partners, LLC. He is responsible for the research strategy of the firm. Jeff graduated from Denison University, holds an MBA from Case Western Reserve University and has over eleven years of investment experience. He is a member of the Northeast Ohio Multiple Sclerosis Finance and Investment Committees, the CFA Society of Cleveland and recently completed his first iron-distance triathlon. Jeff and his wife, Dana, have two children.



About Brewster Mansion

The Brewster Mansion, 9 Aurora Street, was built in 1853, on the site of an earlier wooden home that belonged to the Brewsters. Anson Brewster had purchased the original building from Owen Brown and lived in it until it was destroyed by a fire in 1842. When the Brewsters decided to rebuild on the site, they hired architect Simeon Porter to design a Gothic Revival "castle" for them on the town square. After the deaths of the Brewsters, the building was sold and became the Park Hotel. In the 20th century, it served as a nursing home, and then as an office building.

—Hudson Library & Historical Society

Products

Broadleaf Partners, LLC provides three primary services:

The Broadleaf Growth Equity Portfolio

This all-cap portfolio holds approximately thirty individual equity securities and is appropriate for clients seeking a growth equity manager. All accounts are separately managed and the minimum account size is \$250,000. Fees are 1% of assets under management annually, paid quarterly in arrears.

The Broadleaf Asset Allocation Portfolio

This portfolio is customized to a client's specific needs utilizing several different asset classes and investment vehicles. This portfolio is appropriate for clients seeking to have Broadleaf manage their entire asset portfolio. All accounts are separately managed and the minimum account size is flexible. Fees are 1% of assets under management annually, paid quarterly in arrears.

Portfolio Consulting Services

This service is appropriate for investors with a self-managed or professionally-managed investment portfolio. After a review, we will provide recommendations based on the client's goals and their existing portfolio. This service is appropriate for clients that want some professional advice, but not ongoing management. There is no minimum account size for this service, but the minimum engagement fee is \$2,000. For those who ultimately sign up for either of the aforementioned products, this fee would offset initial billings.