

# RTC Endorsement of Jake Lubel

---

TOWN OF WILTON

BOARD OF SELECTMEN

BOARD AND COMMISSION

CANDIDATE SUBMISSION BY THE REPUBLICAN PARTY

*Please fill out the following for each candidate being endorsed of a Board or Commission appointment. This application plus additional materials should be emailed to Jackie Rochester in the First Selectman's Office. Please note each candidate must also complete a Candidate Application.*

Board or Commission: **Economic Development**

Candidate: **Jake Lubel**

Number of applicants interviewed for this position: **One**

Reasons for recommending this candidate:

Jake Lubel was vetted and endorsed by the RTC on March 9<sup>th</sup>, 2021 for a seat on the Economic Development Commission.

Jake is relatively new to Wilton, having moved here in 2019, but is eager to make a positive impact. His demonstrated interest in business and understanding of the thought processes of company owners and managers of all sizes will be helpful as the EDC looks to promote businesses to relocate to or start-up in Wilton.

Jake's daily interactions with a wide array of business executives from companies in a plethora of industries have the potential to open up productive dialogues for the Economic Development Commission.

The fact that Jake has three young children, the eldest of whom is in kindergarten at Miller-Driscoll, means he has a deep and long-term vested interest in promoting Wilton's growth and viability. His early involvement with the RTC has shown he will work diligently, both as a leader and with others on their ideas.

# Candidate Application – Jake Lubel

---

## TOWN OF WILTON BOARD OF SELECTMEN

### BOARD AND COMMISSION CANDIDATE APPLICATION

***All candidates who wish to be considered for appointment to a non-elected Board or Commission or appointed to a vacancy on an elected Board filled by the BOS must complete this application. Where appropriate candidates may choose to reference an attached resume, containing the required information***

Board or Commission: Economic Development Commission

Candidate: Jake Lubel

Contact information:

Phones: 301-873-8170 (cell); 212-521-2733 (office)

Email: jakelubel@gmail.com

Political Affiliation: Republican

Addresses for the last 10 years:

7 Coachmans Place Wilton, CT 06897

25 River Road #3103 Wilton, CT 06897

137 Hollow Tree Ridge Road #221 Darien, CT 06820

180 Broad Street #1136 Stamford, CT 06901

339 W. 71<sup>st</sup> Street #10 New York, NY 10024

804 Chumleigh Road Baltimore, MD 21212

23 Pierside Dr. Apt. 311 Baltimore, MD 21230

Employment for the last 10 or more years:

Loews Corporation

T. Rowe Price

Post high school degrees and certifications:

B.A. Economics & Business Management (double major) – Guilford College

MBA – Columbia Business School

Wilton town or community volunteer positions for the last 10 or more years:

Wilton Republican Town Committee (since September 2020)

Volunteer positions outside of Wilton for the last 10 or more years:

Roland Park Little League – three seasons as a coach

Columbia Business School Applied Valued Investing Program, Student Mentor (1-2 students per year since 2014)

# Candidate Statement for Seeking Appointment

---

**Candidate:** Jake Lubel  
**Address:** 7 Coachmans Place, Wilton  
**Email:** jakelubel@gmail.com  
**Phone:** Cell: 301-873-8170  
Work: 212-521-2757

**Commission:** Economic Development Commission

**Reason for Seeking Appointment:** My wife and I love Wilton and are excited to raise our three kids here. As such, I want to do as much as I can to help this town flourish. One way I think I can make an impact is by helping the town recruit and retain great businesses. These businesses importantly 1) employ Wilton residents 2) pay taxes, and 3) foster a feeling of growth and excitement. If as a town we are successful at bringing in new employers, we make the town financially stronger and stand a chance at lessening the property tax burden on homeowners over time, which would in turn increase the attractiveness of Wilton even more to current and prospective residents. I feel that Wilton is an amazing place to live and work (though I do not work here), endowed with many great features, yet needs some help taking advantage of this. I think I can help.

**Qualifications for Appointment:** As a fundamental, long-term investor at a well-regarded firm, I spend a great deal of my time speaking and meeting with public (and some private) company executives. As such, I have experience dealing with business leaders across many industries and have a natural way to make it known to decision makers that Wilton is a fantastic place to locate their knowledge workers. Also, I have a strong fundamental understanding of a wide array of businesses and their needs. Lastly, I am passionate about Wilton and am willing to work hard to improve the business climate in the town.

## JAKE LUBEL

7 Coachmans Place | Wilton, CT 06897  
301-873-8170 | jakelubel@gmail.com

---

**PROFESSIONAL PROFILE:** Tireless and passionate investor with a strong record of success at two distinguished firms. Possess a deep understanding of business strategy, encompassing pricing, sales, marketing, operations, financial, and tax domains, as well as competitive tactics, across industries and business models.

### EXPERIENCE

- |              |  |               |
|--------------|--|---------------|
| 2014-Present | <b>LOEWS CORPORATION – Holding Company</b><br><b>Analyst, Equity Team</b>  | New York, NY  |
|              | <ul style="list-style-type: none"><li>• On a team of five that is responsible for Loews' (controlled by the Tisch family) equity investments; portfolio is concentrated (~25-30 positions) with an eclectic investment approach</li><li>• Conduct detailed due diligence of portfolio and potential investments, including visiting company headquarters and facilities, developing relationships with management teams, detailed financial analysis, conducting channel checks with competitors, customers, and suppliers, and attending investment and industry conferences</li><li>• Originate and recommended public investments spanning industries, business models, and market capitalization sizes; formally present investment ideas to Loews senior executives</li></ul> |               |
| 2013-2014    | <b>T. ROWE PRICE – Mutual Fund</b><br><b>Analyst, Equity Research</b>  | Baltimore, MD |
|              | <ul style="list-style-type: none"><li>• Responsible for all firm investments in the healthcare technology and benefits services industries across public and private companies; led investments in mature multibillion-dollar firms as well as a series A venture investment</li><li>• Deeply diligenced investment ideas -- attended industry conferences, visited company headquarters, conducted financial analysis; presented recommendations to portfolio managers across the firm</li></ul>  |               |
| 2008-2011    | <b>T. ROWE PRICE – Mutual Fund</b><br><b>Associate Analyst, Equity Research – Small Cap Value Team</b>   | Baltimore, MD |
|              | <ul style="list-style-type: none"><li>• Trained under prominent investor Preston Athey, longtime manager of T. Rowe's Small Cap Value Fund</li><li>• Conducted detailed fundamental and financial due diligence on companies in a wide variety of industries as a small cap generalist; recommended and managed many positions for this \$10 billion+ fund</li><li>• Led or participated in an average of four in-person meetings per week with portfolio company executives</li></ul>   |               |
| 2006-2008    | <b>WACHOVIA SECURITIES – Investment Bank</b><br><b>Analyst, Consumer &amp; Retail Group</b>  | Charlotte, NC |
|              | <ul style="list-style-type: none"><li>• Built financial models, prepared presentations, and drafted deal-related materials for mergers, leveraged buyouts, sale leasebacks, and equity and debt financings for a wide range of companies across the retail sector</li></ul>  |               |

### EDUCATION

- |           |  |                |
|-----------|--|----------------|
| 2011-2013 | <b>COLUMBIA BUSINESS SCHOOL</b><br><b>MBA (Dean's Honors), Value Investing Program</b>   | New York, NY   |
|           | <i>Awarded, Columbia Fellows Scholarship:</i> Based on 'potential to lead the world's enterprises'<br><i>Co-Editor, Graham &amp; Doddsville investment newsletter; Finalist, 2012 Pershing Square Challenge:</i> On team of three that finished in third place in this investment competition supported and judged by Bill Ackman  |                |
| 2002-2006 | <b>GUILFORD COLLEGE</b><br><b>BA, Economics and Business Management, May 2006 – GPA: 3.89</b>  | Greensboro, NC |
|           | <i>Honors:</i> Dean's List (all semesters), Dana Scholar (on the basis of character, scholarship, and leadership), and Fred Courtney Award (given to the outstanding Business Management student)<br><i>Varsity Baseball:</i> Captain, Shortstop; Member of Student Athlete Advisory Committee<br><i>Work Study Job:</i> Manicured the baseball field to help pay for school |                |

### VOLUNTEER EXPERIENCE

- |              |   |
|--------------|---|
| 2020-Present | Wilton Republican Town Committee  |
| 2014-Present | Student Mentor, Columbia Business School Applied Valued Investing Program (1-2 students per year) |
| 2009-2010    | Roland Park Little League Coach, three seasons (fall, spring, fall)                               |