



Press Release

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For Immediate Release

**Founder of Todd Asset Management, Bosworth M. Todd, Jr., CFA, Passes Away**

We are sad to report that Bosworth M. Todd, Jr., CFA, Chairman Emeritus of Todd Asset Management, passed away on January 22, 2024. Our condolences go out to his widow, Sue Todd and surviving sons David Todd and Jimmy Todd and his stepson Davidson MacLaren and their families. Bos was preceded in death by his son Samuel Todd.

Bos founded The Todd-Boston Company of Louisville in 1967, which later became Todd Investment Advisors. He helped grow the firm and played a significant role in management until the early 2010's. Prior to founding Todd Investment Advisors he was a Vice President for Kentucky Trust Company. He began his investment career with J.J.B. Hilliard, W.L. Lyons as an investment analyst in 1956 after serving two years in the U.S. Air Force. He earned an undergraduate degree from The University of Kentucky, and an MBA from the Harvard Business School.

Bos was active in industry and local civic organizations. In Louisville, he was well known for giving his Annual Investment Outlook Presentation to the Rotary Club of Louisville for over forty years. He received the Rotary Lifetime Achievement Award in 2016. He was active in other local causes as well, being one of the founding members of Wellspring, Inc., an organization that promotes mental health recovery for adults with serious mental illnesses. In 1980, he testified before the US House Appropriations Sub-Committee on behalf of supportive housing for the mentally ill. Bos played a key role in the 1985 founding of the National Alliance for Research on Schizophrenia and Depression, now called the Brain and Behavior Research Foundation. His work on behalf of these organizations led to him being a 2015 Lifetime Achievement Award winner from Invest in Others, a charitable organization dedicated to philanthropy from Financial Professionals. He was a former Director of American Life & Accident Insurance Company of Kentucky, First Capital Bank of Kentucky, Kentucky Historical Society Foundation, Louisville Society of Financial Analysts, and a previous director of the Investment Counsel Association of America.

Bos was a Dean of the Industry, a mentor and friend to all the firms' partners, employees, clients and the investment industry at large. His intellectual curiosity, humility of experience, and courage to act were hallmarks of his success. He also had an adventurous and funny side to him that was a pleasure to all who knew him. He led by example and was an inspiration to us all. We appreciate his contributions to the success of our firm and his presence will be missed.