

Executive Dossier

Prepared by E. Mosbacher



Executive: Daniel Mercer
Company: Northline Ventures
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Title: Founder & Managing Partner
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EXECUTIVE SNAPSHOT

Founder and Managing Partner of Northline Ventures, a Chicago-based early-stage investment firm focused on logistics, infrastructure, and industrial tech.

Daniel is a decisive, forward-moving operator who values efficiency, discretion, and preparation. He prefers minimal back-and-forth and relies on clear, well-organized support to maintain momentum across a high volume of internal and external commitments.

COMMUNICATION PREFERENCES

- Primary: Email (external) | Slack (internal)
- Text: Reserved for urgent/time-sensitive matters
- Response Style: Concise, direct, no unnecessary context
- Turnaround Expectation: Same-day whenever possible

Notes:

Prefers pre-read materials ahead of meetings. Appreciates draft responses prepared with context and recommended next steps.

PROFESSIONAL PATTERNS

- Weekly leadership meeting (Mondays, 9:00 AM CT)
- Investor calls typically Tues–Thurs mornings
- Fridays reserved for internal work / deal review

Key Stakeholders:

- CFO – Melissa Grant
- Operating Partner – Chris Nolan
- Executive Assistant (you) – primary coordination point

Notes: Reinforce 15 min buffer between meetings for mental reset

Preferred Meeting Locations

Breakfast/Lunch

Starbucks -W. Loop
2200 N. Halstead St.
Chicago, IL 60614

Dinner/Drinks

Gibson's Italia
233 N. Canal St.
Chicago, IL 60606

Meetings/Group

Convene
311 W. Monroe St.
Chicago, IL 60607

The Allis (Soho House)

113-125 N. Green Steet
Chicago, IL 60607
Gibson's Italia

The Office

955 W. Fulton Market
Chicago, IL 60607

Workbox

306 W. Erie St.. #300
Chicago, IL 60654

PERSONAL DETAILS

- Spouse: Lauren Mercer (Interior Designer)
- Children: Two (Ages 8 and 5)

Important Dates:

- Anniversary: June 14
- Lauren's Birthday: September 22
- Annual family trip: First week of August

Standing Personal Notes:

- Sends flowers to Lauren on anniversary + birthday
- Prefers to keep family commitments protected after 6:00 PM

PREFERENCES

- Cuisine: Steakhouse, Italian, high-end casual
- Dietary Notes: No shellfish
 - Favorite Restaurants: Bavette's Bar & Boeuf
 - Monteverde
 - RPM Italian
- Coffee Order: Iced Americano, no room
- Dry Cleaner: CD One Price Cleaners (West Loop location)

CRITICAL INFORMATION (Confidential)

- **Emergency Contact: Lauren Mercer – (312) 555-8891**
- **Allergies: None noted**
- **Medical Preference: Northwestern Memorial Hospital (Chicago)**

Travel Profile

Flights

- Preferred Airline: Delta
- Status: Platinum Medallion
Member #59226307
- Seat Class: Business or First Class
- Seat Preference: Aisle, front of cabin

- Car Rental: National (Executive Elite)
- Vehicle Preference: Mid-size SUV

Hotel Preference

- Primary: Marriott Bonvoy
(JW / Autograph Collection)
The Lexington
511 Lexington Avenue
New York, NY 10017
(212) 755-4400
- Secondary: Boutique hotels in major cities

OTHER DETAILS (MISC)

- Suit Size: 40R
- Preferred Clothing Colors: Navy, Charcoal, Light Blue (accent)

Hobbies + Interests

- Plays on "beer league" hockey team (Sep-Apr)
- Favorite Movie: Top Gun
- Favorite Book: The Hobbit by Tolkein

Standing Personal Notes:

- Needs reminder for daily water intake

EDUCATION + CAREER NOTES

- Education: B.S. in Finance, University of Michigan – Ross School of Business
- Early Career: Investment Banking Analyst, J.P. Morgan (Chicago)
- Growth Stage: Vice President, Middle Market Private Equity – Lakeview Capital
- Current Role: Founder & Managing Partner, Northline Ventures (est. 2018)

WORKING STYLE NOTES

- Moves quickly and expects proactive support
- Values discretion and sound judgment
- Prefers problems to be solved before they reach him
- Appreciates when details are handled without prompting