



RMB Capital Combines Milwaukee-Area Teams at New Location *Move Brings Firm's Local Advisors and Portfolio Managers Together Under One Roof*

MILWAUKEE - August 7, 2019 - RMB Capital (“RMB”), an independent investment advisory firm with approximately \$9.4 billion in assets under management,¹ announced that it is relocating its Milwaukee operations to a new location at 10361 W. Innovation Drive, Suite 350, in Milwaukee, effective August 19, 2019.

The firm established a presence in the Milwaukee area in 2017 when it combined with Jacobus Wealth Management (JWM), an independent firm that had been providing wealth management and family office services since 1985. RMB serves local private clients as RMB Jacobus in recognition of JWM’s more than 30-year presence in the community and its founder’s lifetime career in Wisconsin’s financial services industry. In 2018, RMB’s Milwaukee-based team grew when it combined with JB Investment Management, a fixed income-focused investment firm based in Brookfield that had been founded in 2008. These two teams, 15 employees in total, will move into the new shared RMB Capital office together later this month.

“We’re very excited about our new space in Milwaukee and about bringing both of these teams together under one roof,” said Richard M. Burridge, Jr., founding partner, CEO and co-chief investment officer of RMB Capital. “It will be helpful in fostering our culture, and hopefully encouraging our clients to drop in and see us. Centralizing our operations here also helps us efficiently manage our overhead, which is important since we pride ourselves on being good stewards of capital.”

ABOUT RMB CAPITAL

[RMB Capital](#) is an independent investment advisory firm. Its businesses include wealth management, family office services, asset management, and retirement plan consulting. Headquartered in Chicago, RMB also has offices in Denver; Jackson Hole, Wyo.; Lake Forest, Ill.; Milwaukee; Minneapolis; New York; Oakbrook Terrace, Ill.; St. Joseph, Mich.; and Washington D.C. To learn more about RMB, visit www.rmbcap.com.

¹ Total assets under management (“AUM”) presented here differs from regulatory assets under management (“RAUM”) reported on RMB Capital’s Form ADV. AUM reflects net assets under management for private funds and mutual funds managed by RMB Capital, while RAUM reflects gross assets under management. AUM also includes RMB West’s assets under advisement, which are not included in RMB Capital’s RAUM. AUM estimated as of 6/30/19.

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