

BY **Kate Vertin**
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A PERSONAL PERSPECTIVE

From Sue Christoph

Based on the appeal of previous interviews we've published in INVESTED, we've decided to make them a recurring feature. It's a great way for us to give our clients and contacts a bit of "backstage access" to our most valuable asset: our people. For this issue, I sat down with Sue Christoph (*Partner, Senior Wealth Manager*) to learn more about her and the role she plays at RMB. Sue joined the firm in 2007, with more than 20 years of experience in client service, research, portfolio management, and leadership. Sue advises many Chicago-area multigenerational clients on their personal plans and investments.

Kate Vertin: Let's start at the very beginning. What is your first memory of what you wanted to be when you grew up?

Sue Christoph: It goes back to a project I did in middle school on the stock market. I found it really intriguing. Our assignment was to select stocks, research and follow them, write letters to the corporations, request annual reports and analyze them, chart the stocks over time, and then provide a summary of the results. This was probably the first time my interest in the markets was piqued, but it wasn't until I was in college that I really revisited this interest again and considered pursuing it as a potential career.

KV: So you knew from an early age that you were interested in the stock market, but when did you decide that wealth management was the career that you wanted to pursue?

SC: It wasn't right away. When I graduated from college, I had offers to work at the Federal Reserve in Dallas, an insurance company in Des Moines, and a small Registered Investment Advisor [RIA] in Chicago. I'm an analytical person, so I did the pros and cons charts for all the

positions and also sought the advice of my father, who was a successful businessman, to try to determine the right path for me.

I ended up choosing the employer in Chicago because I thought working for a smaller company and really learning the ropes would give me the greatest opportunity for experience. It turned out to be the best decision, and I never looked back. The firm I joined was an RIA specializing in an absolute return-type strategy called convertible arbitrage. We worked with high-net-worth individuals and, eventually, with institutions. My role there started out in client accounting, getting to know the clients and understanding the types of securities we owned. Then I moved through trading, research, and marketing and really got a great perspective of all facets of the business. I ended up in portfolio management, which was what I enjoyed the most—making decisions on what securities to buy and sell, managing the portfolio, writing investment reviews, and meeting with clients.

When I graduated from college, the wealth management industry didn't really exist. You had a choice of being a broker and calling people about the "hot stock opportunity" or working in asset management. I felt that »

asset management was a much better fit for me. Over time, as my career progressed and several corporate ownership changes took place, I began to reconsider what I really wanted to do for the next stage of my life. I was interested in working with individual investors again, and, at this point in my career, I was working with institutions. I had generated a great track record, but I wasn't feeling fulfilled.

KV: So then you joined RMB in 2007. What convinced you to take a chance on an "up-and-coming" firm?

SC: When I met Dick¹ and he shared his vision for the independent firm they were building—one that was very client-centric—it really appealed to me. Then the more I got to know people at the firm, the more impressed I was with their work ethic and commitment to clients. I interviewed with about half the employees, so it was clear that employees needed to be a good cultural fit for RMB!

RMB's sophisticated investment offerings were also a draw. Coming from the asset management industry, it was very important to me that we weren't just offering a cookie-cutter approach. Our firm takes advantage of opportunities in the market that are often "under the radar" or unavailable to larger competitors, which I think is a real value add for our clients.

So I came on board, learned from my colleagues, and got my Certified Financial PlannerTM designation in order to build on my business and investment credentials and experience. Today, I'm a partner in our wealth management practice. I really enjoy working with busy executives and multigenerational families, and also mentoring young associates to be successful future advisors.

KV: You emphasized the importance RMB places on our culture. What do you like most about it?

SC: What's really special about RMB is the collaborative environment, especially with fellow partners and advisors.

We're all working together to try to provide our best service and advice to clients. At many other firms, teams work in silos and are competing with each other. I see that as an unnecessary distraction that doesn't serve clients well.

KV: That makes sense. So collaboration fosters an environment that feels empowering and supportive?

SC: Definitely.

KV: Do you think our culture is part of what's helped us attract and retain so many female employees in an industry that tends to be more male dominated?

SC: That's probably a fair statement. I think RMB appreciates that we have a strong representation of women, in the wealth management group and the firm overall. Last year, we created "Women Invested," a network that includes all of our female employees, because we wanted to celebrate this aspect of our culture. I am part of the steering committee along with a number of other women from all departments and of all ages. We provide opportunities for professional growth and mentoring, encourage networking and relationship building, and look for ways to engage communities of women outside the firm—clients, peers, partners, etc.

KV: That's great. It's evident that you are passionate about your role here at RMB. What are some of your passions outside of work?

SC: My passions outside of work include spending time with family and friends, charity involvement, travel, and supporting my Iowa Hawkeyes! I traveled to Pasadena this year to see the Hawkeyes play in the Rose Bowl. While the final score was heartbreaking, the trip was a lot of fun—reminiscing with college friends, sightseeing, and taking time to smell the roses while walking by the floats along the Rose Parade route early New Year's Day. The Rose Bowl and Parade should be on everyone's bucket list! ■

¹ Richard Burrige Jr., Founding Partner, CEO, and Chief Investment Officer.

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