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State of the Firm

In 2017, we celebrated our 12th anniversary as an independent firm. We've experienced significant growth over the years. We started in a small office with a handful of employees, managing around \$500 million in assets. We are now a team of over 190 people in 11 offices nationwide, trusted to manage over \$8.4 billion in assets. Many factors have contributed to the growth and evolution of our business, and you have likely heard about some of them along the way—via letters from our co-founders within each issue of INVESTED, email announcements from RMB, conversations with your wealth advisor, or even news coverage of our press releases. We understand it can be difficult to put all of these updates into context, so this article will offer a summary of how our business looks today and how our clients benefit from the firm's growth.

National presence, local mentality

Since day one, we have prided ourselves on building close, personal relationships with our clients. By expanding our presence geographically, we are in closer proximity to more of our clients and can meet in person more often, which is an important element in upholding our signature standard of service. Our decision to establish an office in a new market always hinges on having the right people to represent RMB; they must be aligned with our values and our commitment to putting clients' interests first. These stars aligned when we brought Don Bechter on board to spearhead our first expansion with an office in Denver. In some cases, such as with our offices in

Washington, D.C. and Minneapolis, we had current advisors with an interest in moving to those cities. In other cases, we've become acquainted with sole proprietors, small practices, or more established firms that sought to combine with RMB—typically to broaden the services and solutions they can provide to clients, alleviate operational challenges, solve succession planning concerns, or accomplish some combination of the three. Circumstances like those led to our having offices in Jackson Hole (WY), Lake Forest (IL), Milwaukee (WI), and New York (NY). We now have about 70 wealth management employees serving clients from our offices around the country.

Specialized expertise and global reach

On the asset management side, our goal is to provide individuals and families with customized asset allocations and sophisticated investment solutions that address their unique circumstances. To accomplish this, we must have a variety of strategies that we can employ—and dial up or down as appropriate in the current market environment. Therefore, we have continued to expand our investment capabilities while staying true to the grounding principles of our investment philosophy. As an example, we have practiced fundamental, bottom-up analysis for years. Yet when the IronBridge team joined our asset management group this past summer, they brought technical tools and expertise that elevated our ability to quantify risk and reward. Our 80-person asset management group includes portfolio managers and »

analysts who specialize in different geographies, industry sectors, and investment strategies. As a result, we are able to access investment opportunities around the world and in niche segments of the market, and we can deliver those opportunities to our clients via a range of solutions, including separately managed accounts, mutual funds, and limited partnerships.

Complementary solutions

Our practice areas have also expanded to include related offerings that leverage our core competencies to meet distinct client needs. In 2012, we launched our Retirement Plan Solutions business, where we serve as a co-fiduciary to employers who sponsor retirement plans. Many of our clients are in leadership positions at companies that need a partner to help them optimize their retirement plans and their employees' retirement outcomes.

Furthermore, we offer family office services to several client families, and it's a practice we are refining so that we can continue to serve those families better. The need for specialized planning capabilities and investment solutions can grow and evolve as clients continue to accumulate wealth, especially when they have multigenerational or blended families. Family governance and wealth transfer considerations—including charitable giving strategies and vehicles—are increasingly complex. Because we are committed to serving all of our clients today and well into the future, it's important that we be able to accommodate their changing needs, as well as those of their children and grandchildren.

Operational excellence and sustainability

From an infrastructure standpoint, we have continued to reinvest in areas like technology and compliance—both of which are critical to serving and protecting our clients' interests. Sophisticated financial planning and

performance reporting systems give us the ability to provide dynamic financial projections and to offer access to account information via a secure client portal. With laptop computers and cloud-based applications, our employees are able to work from almost anywhere. This allows them to stay connected while traveling, whether they're off to meet with clients, to conduct due diligence on investment opportunities, or to attend industry conferences. And our state-of-the-art video conferencing system lets us conduct virtual face-to-face meetings with clients and our fellow employees when we can't be in the room together. We are continually reviewing, testing, and refining our cybersecurity practices to help our clients keep their information and assets safe. We've developed robust business continuity plans and disaster recovery procedures in order to be here for our clients each day, no matter what happens.

Unwavering dedication

Over the past 12 years, we've focused on building a strong culture where our employees are inspired by our values of authenticity, excellence, rigor, solutions, and results. We've remained united behind these principles, even as we've grown from a small practice to a multifaceted firm with a wide range of roles, backgrounds, and perspectives. While many of the factors that influence our business are inherently difficult to predict, we hope our clients feel comforted by the knowledge that our team is here for you, as stewards of your assets and your trust. ■