



RMB Capital Names Michele Francisco to Lead Wealth Management Business

CHICAGO- February 5, 2020 –RMB Capital (“RMB”), an independent investment advisory firm with approximately \$9.4 billion in assets under management¹ (estimated as of Dec. 31, 2019), announced that partner and chief of staff Michele Francisco, CFP®, has been named to lead the firm’s wealth management business. Francisco is working side-by-side with CEO and co-chief investment officer Dick Burrige as she transitions into this new role later this year.

“Fred [Paulman, president] and I have worked closely with Michele since 2001, four years prior to RMB’s inception,” said Burrige. “She has helped set the standard for client service at our firm from the very beginning. Her skills in both financial planning and relationship management have been instrumental in serving our largest and most complex clients for the last 12 years. I have complete trust and confidence in her ability to lead our wealth management team well into the future.”

“I’m incredibly honored and excited to be moving into this role, leading a team of colleagues and friends that I have so much respect for,” Francisco said. “I welcome the challenge of leveraging my analytical skills, advisory experience, and institutional knowledge in a new way, and I’m so grateful to have the opportunity to do so here at RMB, which has been home to me for so many years.”

Francisco will replace former president of wealth management Dimitri Eliopoulos, who departed the firm at the end of January to pursue another opportunity.

“We were sad to see Dimitri go, as he also had a 20-year tenure with us and made a big impact over that time,” Burrige added. “But we continue to think of him as part of the RMB family, and we’re all rooting for him as he embarks on his new endeavor.”

Over nearly two decades with the RMB team, Francisco has filled various positions. She began with responsibilities that ranged from trading to managing client events and communications. In 2007, she started working directly with some of the firm’s largest clients, and she also assumed responsibility for

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 12/31/19.

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managing the client service administrative staff and the firm's custodial relationships from 2010-2012, when she was promoted to senior wealth advisor. She became a partner in 2015.

Previously, Francisco worked at UBS Financial Services and Bernstein Investment Management. She is a CERTIFIED FINANCIAL PLANNER™ professional and holds a bachelor's degree in international affairs and economics from George Washington University and an MBA from Kellogg School of Management at Northwestern University.

Certified Financial Planner Board of Standards, Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

ABOUT RMB WEALTH MANAGEMENT

For high-net-worth individuals and families, RMB Wealth Management provides holistic financial planning services as well as asset allocation recommendations and investment implementation. Its goal is to pilot a personalized financial plan designed with each client's best interests, unique needs, and long-term objectives in mind.

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 rmbcapital.com.

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