



RMB Capital's 15th Anniversary a Time for Gratitude, Reflection

CHICAGO- April 14, 2020 –RMB Capital (“RMB”) marked its 15th anniversary of the firm’s founding two weeks ago under surreal circumstances: a global pandemic with millions of people living under stay-at-home orders or local lockdowns, market volatility featuring some of the steepest one-day drops and bounce-backs in history, and all RMB employees working remotely and meeting with clients and colleagues via virtual conferencing.

“We’re truly in uncharted territory in many ways – it affects everyone,” said Dick Burrridge, founding partner, CEO and co-chief investment officer of RMB. “It’s a stressful time, but I am an eternal optimist. And the resilience our team has shown in the face of this adversity has been amazing; their fortitude is a testament to why I believe we’ll get through this and come out the other side even stronger.

“We’ll celebrate this milestone with our team once we are able to gather together again, but we felt it was important to publicly acknowledge the contributions of our employees and the loyalty and support of our clients over the past 15 years,” Burrridge added.

Launched on April 1, 2005 with just 19 employees and \$500 million in assets by Burrridge and founding partner and president Fred Paulman, the firm has grown to approximately 170 employees across ten locations nationwide and now has more than \$7.6 billion in assets under management¹ (estimated as of Mar. 31, 2020). While the young firm’s mettle was tested during the 2008-2009 financial crisis, RMB actually grew its assets under management. Burrridge attributes this to the team’s proactive, consistent client outreach and to the firm’s investment philosophy – taking a long-term view, conducting fundamental analysis, being opportunistic yet disciplined, and avoiding unnecessary risk. Combined with prudent diversification and asset allocation, this philosophy helps to insulate clients’ portfolios during times of market volatility.

In 2005, the firm started with a focus on providing private clients with wealth management and in-house investment management. Today, it’s a diversified independent investment advisory firm that

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 3/31/20.

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serves institutional investors and retirement plan sponsors, in addition to private clients and family offices. What began with a single office in Chicago (still home of the firm's headquarters), now includes ten offices nationwide, stretching from New York to the Rocky Mountains. Earlier this year, RMB launched a new website to showcase the firm's capabilities, offerings, and vast library of investing and planning insights, as well as to facilitate clients' access to various secure portals where they can review documents and account information.

"Fred and I have had a vision for this firm that's guided us since day one, and I don't think you can overestimate how important that is, especially given the uncertainty and cyclicity that's inherent in our industry," said Burrige. "I've never been prouder of our team – the way our employees have rallied together to provide continuity and guidance for our clients through these unprecedented circumstances has been remarkable."

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.

MEDIA CONTACT:

Shawn Malayter
Senior Associate
Greenhouse Partners
T | 872-267-2636
E | smalayter@greenhousepartners.com

RMB CONTACT:

Kate Demet
Partner, Chief Marketing Officer
RMB Capital
T | 312-784-3203
E | kdemet@rmbcap.com
