



RMB Retirement Plan Solutions Celebrates Accolades

Team Recognized by PLANADVISER and National Association of Plan Advisors

CHICAGO- June 4, 2020 – RMB Capital (“RMB”), an independent investment advisory firm with more than \$7.6 billion in assets under management¹ (estimated as of Mar. 31, 2020), announced that James Rosselle, vice president and director of RMB Retirement Plan Solutions, was recently named to the PLANADVISER Top 100 for 2020.

The national trade magazine ranks “noteworthy plan specialists, based on number of plans and assets under advisement.” Rosselle was among a small group of 13 in the “Individual Advisers With \$1 Billion or More in Retirement Plan Assets Under Advisement” category.

The award comes on the heels of RMB being named to the list of the top defined contribution teams by the National Association of Plan Advisors (NAPA). NAPA’s list focuses on teams with at least \$100 million in assets under advisement (AUA) and represents more than \$1 trillion total in defined contribution AUA. Significantly, those teams include more than 1,500 advisors – and many more support personnel – working to help Americans prepare for retirement in 40 states and Puerto Rico.

“We’re very happy for our Retirement Plan Solutions team to receive these national honors,” said Dick Burrige, Jr., founding partner, CEO and co-chief investment officer of RMB. “James and his team have worked hard to help organizations optimize their retirement plans with a holistic and results-driven approach. It’s wonderful to see those efforts being recognized.”

RMB Retirement Plan Solutions examines all aspects of an organization’s retirement plan, from plan design and administration to total plan costs. The offering focuses on serving as a fiduciary safeguard, enhancing the participant experience, conducting benchmarking and RFP vendor searches, and performing investment due diligence.

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.

ABOUT RMB RETIREMENT PLAN SOLUTIONS

RMB Retirement Plan Solutions focuses on driving measurable improvements across all aspects of an organization's retirement plan in order to optimize outcomes for the firm, its employees, and its executives. RMB serves as a co-fiduciary, taking a holistic, impartial, disciplined approach to drive results.

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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