

UPDATES ABOUT OUR BUSINESS

In early 2020, Michele Francisco was named to lead RMB's wealth management business.

Michele is working side by side with Dick Burridge as she transitions into this role over the course of the year. "Fred Paulman and I have worked closely with Michele since 2001, four years prior to RMB's inception," said Burridge. "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."

RMB Capital marked its 15th Anniversary as an independent firm on April 1, 2020.

The milestone passed with a backdrop of dramatic market volatility, as the global pandemic and related shutdowns were in the early stages. "Fred Paulman 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 cyclical nature that's inherent in our industry," said Dick Burridge. "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."

The Summer 2020 edition of INVESTED has been produced solely in a digital format.

Given current events related to the global pandemic, its impact on financial markets, and the rapid pace of the news cycle, we chose to forego the printing process so that we could get this content out to our readers more expeditiously.

At the end of January, RMB Capital launched its new website at www.rmbcapital.com.

In addition to outlining who we are and what we do for those seeking the services we can provide, our website also has valuable resources for existing clients! Access a vast library of RMB news and insights, using the search refinement options to filter for specific topics of interest. Learn more about your advisory service team members (or anyone else at RMB) via the people page. By clicking on someone's bio, you'll see any articles that were written by or about that employee. Refer to the utility bar in the upper right corner for links to log into your RMB account or to visit our YouTube, LinkedIn, or Facebook profiles. Please explore and let us know what you think!

The RMB Retirement Plan Solutions (RPS) team's efforts were recognized by PLANADVISER and the National Association of Plan Advisors (NAPA) this spring.

RPS 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. James Rosselle (*V.P., Director of Retirement Plan Solutions*) was named to the PLANADVISER Top 100 for 2020 list, among a small group of 13 in the "Individual Advisers with \$1 Billion or More in Retirement Plan Assets Under Advisement" category. The firm's RPS business also drove the inclusion of RMB on NAPA's list of top defined contribution teams, which focuses on teams with at least \$100 million in assets under advisement (AUA) and represents more than \$1 trillion total in defined contribution AUA.