



## RMB Capital Recognized in 2020 Financial Times 300 Top Registered Investment Advisers

**CHICAGO- July 30, 2020** – RMB Capital (“RMB”), an independent investment advisory firm with approximately \$8.7 billion in assets under management<sup>1</sup> (estimated as of June 30, 2020), announced that it has been included in the 2020 edition of the *Financial Times* 300 Top Registered Investment Advisers. Click through to the *Financial Times* website for the [complete list and related analysis](#).

This is the seventh annual FT 300 list, produced independently by Ignites Research, a division of Money-Media, Inc., on behalf of the Financial Times. Ignites Research provides business intelligence on investment management. It is the fourth consecutive year that RMB has been named to the list.

Registered investment advisory firms that met a minimum set of criteria applied for additional consideration. Applicants were then graded on six quantifiable factors: assets under management (AUM), AUM growth rate, years in existence, advanced industry credentials of the firm’s advisers, online accessibility and compliance records. There are no fees or other considerations required of firms that apply to the FT 300.

“We certainly understand how competitive our industry is, and we don’t take accolades like this for granted,” said Dick Burrige, RMB’s founding partner, CEO and co-chief investment officer. “We appreciate the *Financial Times* and its partners for conducting this analysis and providing investors with its assessment. It offers objective, diligent insights that investors need now more than ever, given the unprecedented confluence of events this year and the heightened uncertainty going forward.”

The final FT 300 represents an impressive cohort of select registered investment advisory firms. The median AUM of RIA firms in this year’s list is \$1.9 billion, and the FT 300 Top RIAs represent 39 different states and Washington, D.C.

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<sup>1</sup> 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 6/30/20.

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RMB counsels its wealth management clients with an investment philosophy centered on several core ideas: taking a long-term view, conducting fundamental analysis, being opportunistic yet disciplined, and avoiding unnecessary risk.

*The Financial Times 300 Top Registered Investment Advisers is an independent listing produced annually by Ignites Research, a division of Money-Media, Inc., on behalf of the Financial Times (July 2020). The FT 300 is based on data gathered from RIA firms, regulatory disclosures, and the FT's research. The listing reflected each practice's performance in six primary areas: assets under management, asset growth, compliance record, years in existence, credentials, and online accessibility. Over 750 qualified firms applied for the award, 300 of which were selected (40%). This award does not evaluate the quality of services provided to clients and is not indicative of the practice's future performance. Neither the RIA firms nor their employees pay a fee to the Financial Times in exchange for inclusion in the FT 300.*

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### 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; St. Joseph, Mich.; and Washington D.C. To learn more about RMB, visit [rmbcapital.com](http://rmbcapital.com).

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