



RMB Capital Among Largest Milwaukee-area Investment Managers

Milwaukee Business Journal Ranking Based on Local AUM

CHICAGO- Sept. 1, 2020 – RMB Capital (“RMB”), an independent investment advisory firm with approximately \$8.8 billion in assets under management¹ (estimated as of September 30, 2020), announced that it has been included in the 2020 list of largest Milwaukee-area investment managers compiled by the *Milwaukee Business Journal*. RMB came in at #19 on the list.

The rankings, which were published in the Aug. 28, 2020 issue of the publication, are based on local assets under management and included RMB Capital for the second consecutive year. RMB was #24 on the 2019 list.

RMB’s Milwaukee office is located at 10361 W. Innovation Drive, Suite 350 in Milwaukee. The location has 15 employees, including the firm’s core fixed income portfolio management team as well as others from the wealth management and family office services teams.

This is the latest in a string of recent honors and recognition for RMB. In July, RMB was named to the *Financial Times* 300 list of top registered investment advisers. Last month, RMB was named to the top 40 *Financial Advisor Magazine* 2020 RIA Rankings.

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. RMB Family Office Services offers a wholly a la carte selection of services that are customized for multigenerational families.

RMB Asset Management specializes in long-term, concentrated, active investing strategies. From long-only strategies to a select lineup of differentiated absolute return offerings, its products span the market-cap spectrum and the globe. Its team of experienced portfolio managers and analysts are united by an emphasis on fundamental research and a belief that quality portfolios outperform.

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 9/30/20.

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.

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