

UPDATES ABOUT OUR BUSINESS

In July, RMB was recognized among the *Financial Times* 300 Top Registered Investment Advisers for the fourth consecutive year.

RIA firms must meet a minimum set of criteria in order to apply. Applicants are 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. "We certainly understand how competitive our industry is, and we don't take accolades like this for granted," said Dick Burridge (*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."

***Barron's* magazine's September issue featured its Top 100 RIA Firms in the nation, including RMB for the fifth year in a row.**

Firms were ranked to help investors find quality financial guidance based on a number of qualitative and quantitative components, including assets under management, the size and experience of their advisory teams, and the regulatory records of the firms and their advisers. "This recognition is a win for our entire team, who has continued to put our clients first during one of the most challenging years in history," said Dick Burridge. "The *Barron's* annual ranking is responsive to trends and important issues in the industry, and it focuses on the criteria that should matter most to investors. That's why being included on this list again is so meaningful to us."

RMB Retirement Plan Solutions earned its third national honor of the year when it was named to the 2020 edition of the *Financial Times* 401 Top Retirement Advisers.

The final *Financial Times* 401 represents an impressive cohort of elite advisers. These are true specialists as DC plans on average account for 86% of total client assets. "We're very excited to see James and his team being recognized by a prestigious publication like the *Financial Times* for the work they do in bringing holistic, fiduciary-driven solutions to retirement plan sponsors in order to help support their employees' long-term financial well-being," said Dick Burridge.

RMB recently announced three new partners who were named in 2020: Jeanette Gawrisch, Loren Knaster, CFA®, CFP®, and Katherine Lester, CFP®.

The partnership model has proven to be crucial in both maintaining the firm's independence and in setting up a path for the firm's future leadership. "We believe being independently owned and operated is in the best long-term interests of our clients, our employees, and our business," said Dick Burridge. "Jeanette, Katherine, and Loren have all put the client at the heart of their work during their many years with us, and having them as partners helps to ensure that we continue to keep the client experience front and center as we grow."