

UPDATES ABOUT OUR BUSINESS

RMB named three new partners for 2021: Thomas Fanter, Laura Flentye, and Dan Matola, CFA. We now have a total of 26 partners among our employees and board of directors. “We rely on our partners to provide insightful perspectives, offer consistent leadership, and serve as role models for the rest of our employees,” said Dick Burridge. “Coincidentally, Tom, Laura, and Dan each joined us about four years ago. It is a testament to their work ethic and the meaningful contributions they have made to the firm over that time that they were invited to join our team of partners in 2021.”

Early this year, Michele Francisco and Seth Davis were both promoted to senior management roles in our client services arm. As chief client officer, Michele now oversees client services for all of wealth management, family office services, and retirement plan solutions. Seth was promoted to managing director of wealth management, overseeing our 25 wealth advisors across eight wealth management offices nationwide. “Both Michele and Seth have spent their time at RMB being laser-focused on client service, striving to provide an outstanding experience for our private clients. Michele was a natural choice to oversee our client service efforts due to her success leading wealth management and her experience with managing some of our largest and most complex clients,” Dick Burridge said. “During his decade with us, Seth has shown tremendous leadership in helping to grow our wealth management business while upholding our high standard of service and mentoring his colleagues, and we are thrilled for him to guide our wealth management team into the future.”

HollyFrontier, our largest client in the RMB Retirement Plan Solutions practice, was recently recognized by PLANSPONSOR for having a Best in Class 401(k) Plan. The 2021 list of Best in Class 401(k) Plans highlighted 20 firms that “have always been ‘leaders’ in taking on plan design features that contribute to positive plan and participant outcomes,” according to Brian O’Keefe, vice president of research at PLANSPONSOR. The 20 honorees were selected from a list of 2,825 401(k) plans that responded to the 2020 PLANSPONSOR Defined Contribution (DC) survey. We are proud to serve as HollyFrontier’s co-fiduciary investment advisor!