



RMB Capital Announces Seven New Partners for 2022

CHICAGO- March 2, 2022 –RMB Capital (“RMB”), an independent investment advisory firm with more than \$10.8 billion in assets under management¹ (estimated as of Dec. 31, 2021), announced that it has named seven new partners for 2022.

The new partners are: Chris Bach, CFA®, CFP®; Dave Banasiak; Shiju Elakkatt; Ann Guntli, CFA®; Tim Hanna, Trevor Isham, CFP®; and Margo Sweany, CFP®. The firm now has 32 partners.

RMB founding partner, CEO and co-chief investment officer Dick BurrIDGE said that the seven new partners help ensure the firm’s long-term independence by readying the next generation of RMB’s future leaders.

“This year’s class of new partners represent many different teams and roles at RMB,” said BurrIDGE. “Some have been with us since we were just getting started and others have joined us more recently, but they have all shown great dedication to delivering the best experience for our clients and ensuring our success as a firm.”

Bach joined RMB Capital in 2014 and is a senior wealth manager in the firm’s Minneapolis office. He is a Chartered Financial Analyst® and a CERTIFIED FINANCIAL PLANNER™. He is also a member of the CFA Institute and a board member for the North Community YMCA Youth & Teen Enrichment Center. He holds a bachelor’s degree in finance from Indiana University.

Banasiak joined RMB in 2014 and is a finance manager for the firm’s corporate accounting team, based in RMB’s Chicago office. He has served in a variety of accounting and finance roles for the firm during his career. He holds a bachelor’s degree in accounting from DePaul University.

Elakkatt came to RMB just two years after its founding in 2007, and is senior operations manager in the firm’s Chicago office. He has helped to guide RMB’s business operations team as the firm has

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 12/31/21.

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expanded nationally. He holds an MBA in finance and economics from the University of Chicago Booth School of Business and a bachelor's degree in accounting from the University of Illinois at Urbana-Champaign.

Guntli joined RMB as an intern in 2007 and currently is a portfolio manager for the firm's asset management division. Based in RMB's Chicago office, she is also a Chartered Financial Analyst®, as well as a member of the CFA Institute and the CFA Society of Chicago. She holds a bachelor's degree in finance and economics from Loyola University Chicago.

Hanna joined RMB in 2017 and serves as manager of technology solutions in the firm's Chicago office. Prior to joining the firm, he spent his career overseeing technology operations for financial, consulting and consumer packaged goods companies. He holds a bachelor's degree in information systems from DePaul University.

Isham has been advising clients as a member of RMB's wealth management team since 2013 and currently serves as senior wealth manager in the firm's Milwaukee office. He is a CERTIFIED FINANCIAL PLANNER™, and holds a bachelor's degree in economics and religion from Colorado College.

Sweany joined RMB in 2009 and is senior wealth advisor in the firm's Denver office. She is a CERTIFIED FINANCIAL PLANNER™, and a board member for the Advanced Beginner Group. She holds a bachelor's degree in business administration and finance from the University of Colorado Boulder.

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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; St. Joseph, Mich.; and Washington D.C. To learn more about RMB, visit rmbcapital.com.

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