



RMB Capital Names Jeffrey J. Burney as Chief Client Officer

CHICAGO- August 8, 2022 –RMB Capital (“RMB”), an independent investment advisory firm with more than \$9.1 billion in assets under management¹ (estimated as of June 30, 2022), announced that it has named Jeffrey J. Burney as the firm’s chief client officer.

Burney has more than 17 years of experience in the financial services industry, most recently serving as chief strategy officer for multi-family office investment firm Crestone Capital, LLC, in Boulder, Colo. Prior to that role, he spent a decade in a variety of roles working with high net-worth clients for JP Morgan Private Bank. In his new role at RMB, Burney will oversee the firm’s wealth management, family office services and retirement plan solutions teams.

“Jeff is a proven leader with a long track record of success providing visionary guidance to wealth management teams and clients, and he has been a catalyst of strategic growth during his career,” said RMB founding partner, CEO and co-chief investment officer Dick Burrige. “His approach to first-class client service and history of business development is a perfect match with our culture.”

“We’re thrilled to bring Jeff aboard as his experience and success across the advisory landscape will bring fresh leadership and perspective to our firm,” said Don Bechter, managing partner at RMB. “I’m also excited to have him join our exceptional and growing team based here in our Denver office.”

“This is an exciting opportunity to join a great firm with great people,” said Burney. “I was drawn to RMB due to its strong leadership and the chance to serve a broad range of clients. I look forward to being a part of RMB’s positive, welcoming culture and inspiring growth story.”

While based in Denver, Burney will lead client service teams across all RMB offices nationwide.

Beyond his wealth of career experience, he holds several industry certifications and earned a bachelor’s degree in finance and business economics from Ohio University. In addition, Burney is involved in several community organizations, including serving on the executive board of the Boy Scouts of

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 6/30/22.

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America's Denver Area Council, The Denver Foundation's Professional Advisors Council, and the advisory council for the University of Colorado Denver's Jake Jobs Center for Entrepreneurship.

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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