

# The Old Fashioned

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## Introduction

As the season begins to change, I thought it an appropriate time to share a staff update and some thoughts on the year so far. First, we were both happy and sad to hear in early summer that Robert had decided to take a leadership role within a Milwaukee bank. Happy as we know Robert will do well in the role but sad that he would not be a teammate any longer. Thus, we began a search for a new wealth advisor and after an exhaustive process are thrilled to welcome Brian Klein to our Milwaukee private client team. Many more details on Brian a bit later but suffice to say I am excited to get him introduced to all of you quickly as he brings a lot to the table.

I promised in the beginning of the year that each of you would hear from us about the 3.5 Obstacles to Successful Investing presentation we created. I believe we met that goal but if we missed you, please reach out and we can schedule time together. The content proved to be incredibly timely as the broad US stock market declined as much as 20% and vacillated around that number for much of the year. Here is what I wrote earlier this year:

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*“Together we will put in the work to fortify  
our investment philosophy so when the  
markets panic our conviction will outweigh  
our fear.”*

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Reviewing and discussing 3.5 Obstacles was part of that fortification process and trust me we aren't done yet. Being a successful investor is mostly about establishing healthy habits in the good times that you can fall back on in the temporary declines. Here are a few one liners to help you out in our current position: “This time won't be different!” “There has never been a permanent destruction of capital in US equity market...unless you sold out.” “Time in the market is far more important than timing the market.” When you open your portfolio update in the next few months and feel some fear trickling in repeat any or all of those and if that still doesn't work pick up the phone and give me a call!



## 2022 New Team Members



Brian Klein, CFP® Wealth Advisor

Brian has 5 years of experience as a financial advisor, partnering with families in Wisconsin and Iowa to help them meet their financial goals. Brian dazzled us with thorough preparation and his strong conviction in fiduciary advising stood out strongly. His previous time at the Wealth Enhancement Group and Gilbert & Cook (other reputable Registered Investor Advisors) were great preparation for the career he will have at RMB Capital. Brian is engaged to his longtime girlfriend and they are scheduled to be married this Spring. He loves the outdoors and spends time hiking, camping, downhill skiing, playing tennis and trying to keep up with his two dogs. Brian volunteers is a CFP board mentor and on the Waukesha County Estate Planning Council. He had a two week break between jobs and on his first day said he was dying by the second week to be back in the office learning our business and working with families. Brian will begin getting to know many of you in the months to come.

## Conclusion

2022 has offered us two large challenges; we lost a team member and the market is going through one of its more severe temporary declines. I am so proud of our team for stepping up to these challenges and holding firm to our investment philosophy when challenged and continuing to provide great service to all of you. Our team will continue to grow but rest assured my priority will always be maintaining the high level of service and execution you have all come to expect. If at any time you think we could do a better job for you, please do not hesitate to reach out.

I cannot wait to introduce you to our great new team member and his expanding role as part of our service offering. Should any of this information spark any questions, concerns, or feedback of any kind I hope that you call or email me directly. From all of us on your RMB Team we thank you for your confidence, your support and look forward to the next time we get to meet.