



VennWell, LLC Joins RMB Capital

CHICAGO - May 31, 2017 - RMB Capital (“RMB”), an independent financial services firm with more than \$6.7 billion in assets under management, announced that it has acquired VennWell, LLC, a financial planning and investment management firm based in Lake Forest, Ill.

The transaction adds approximately \$250 million in assets under management. Colleen Chandler, VennWell’s founder and managing director, will join RMB as a managing director and senior wealth advisor. The rest of the VennWell team will also join RMB, and the firm’s current office at 550 Oakwood Ave. in Lake Forest will become a new RMB location.

“Colleen and her team are a great strategic and cultural fit with RMB in a number of ways,” said Richard M. Burrige, Jr., RMB Capital founding partner, CEO and chief investment officer. “We share an investment philosophy focused on driving long-term, risk-adjusted growth, and their dedication to high-quality client service aligns with our approach and values. We’re thrilled to have them on board.”

Founded in 2002, VennWell has grown under Chandler’s leadership by offering highly personalized service and solutions in financial planning, investment management, investment consulting, and advisory oversight for 401(k) and 529 college-savings plans. Chandler and her firm are also highly involved in the community, supporting a number of local nonprofit organizations across Lake County, Ill.

“We’re very excited to be joining RMB,” Chandler said. “We’ve been looking for a partner that would help us deliver a broader array of investment offerings to our clients, while being in sync with our investment approach and our tradition of being fully dedicated to our clients’ best interests. RMB fit the bill on all counts. Our clients can expect a seamless transition with all of the thoughtful, dedicated guidance they’ve come to expect from us.”

ABOUT RMB CAPITAL

RMB Capital is an independent, diversified financial services firm. Its businesses include wealth management, asset management, and retirement plan consulting. RMB is headquartered in Chicago with offices in Denver, Jackson Hole, Wyo., Washington, D.C., and New York City. To learn more about RMB Capital, visit www.rmbcap.com.

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