



## Jacobus Wealth Management to Join RMB Capital

**CHICAGO – Oct. 26, 2017** – RMB Capital (“RMB”), an independent financial services firm with more than \$8.4 billion in assets under management, announced a pending combination with Jacobus Wealth Management (“JWM”), a privately held Registered Investment Advisor based in Milwaukee, Wis.

The transaction will add approximately \$860 million in assets under management. JWM employees – including Peter Bach, JWM chairman and CEO, and Dan Matola, JWM president and chief investment officer – will become RMB employees as of the transaction closing date, November 30. JWM’s Milwaukee location will become known as RMB Jacobus, in recognition of JWM’s more than 30-year presence in the community and its founder’s lifetime career in Wisconsin’s financial services industry. Richard Jacobus, JWM chairman emeritus, originally founded the firm in 1985 and served as chairman until late 2009, when Bach assumed the role.

“JWM is well-known in Milwaukee, where the team has established a reputation for the quality of service they provide to their clients,” said Richard M. Burrige, Jr., RMB founding partner, CEO and chief investment officer. “My longtime colleague and RMB partner Jeff Pearsall has known senior executives from JWM for more than a decade, and it’s a great fit from a philosophical and cultural perspective. We are excited to work together. JWM also brings deep expertise in family office services, which is invaluable as we continue to develop that practice at RMB.”

When JWM was founded, it was a single family office serving multiple generations of the Jacobus family. It became a Registered Investment Advisor in 1996 and began serving additional clients with its investment advisory and family office services. Over time, the firm expanded its capabilities related to tax and financial planning.

“We take a diligent and thoughtful approach in preparing and investing for our clients’ future, and we’ve done the same in evaluating this opportunity for our business going forward,” Bach said. “RMB holds themselves to the same high standards of service that we do – and that our clients deserve and expect. The caliber and depth of RMB’s team is remarkable, and we are excited for the opportunity to tap into their investment, planning, and operations resources for the benefit of our clients.”

**ABOUT RMB CAPITAL**

RMB Capital is an independent, diversified financial services firm. Its businesses include wealth management, asset management, and retirement plan consulting. Headquartered in Chicago, RMB also has offices in Denver; Jackson Hole, Wyo.; Lake Forest, Ill.; Minneapolis; New York; Oakbrook Terrace, Ill.; and Washington D.C. To learn more about RMB, visit [www.rmbcap.com](http://www.rmbcap.com).

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**MEDIA CONTACT:**

**Shawn Malayter**  
**Senior Associate**  
Greenhouse Partners  
T | 872-267-2636  
E | [smalayter@greenhousepartners.com](mailto:smalayter@greenhousepartners.com)

**RMB CONTACT:**

**Kate Demet**  
**S.V.P, Director of Marketing & Communications**  
RMB Capital  
T | 312-784-3203  
E | [kdemet@rmbcap.com](mailto:kdemet@rmbcap.com)

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