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Employee
Profile

Dan Matola



Our Employee Profile series continues with this installment, featuring Dan Matola, CFA, Partner and Senior Relationship Manager of Family Office Services (FOS) in our Milwaukee office. We met for a virtual interview to talk about his personal story, including being a Milwaukee native and longtime sports fan, his twenty-year career in client relationship management, and how building trust and problem-solving are key components of his role.

Olivia Thielke: Olivia: Let's start by discussing your life outside of work. I know you're a fan of golf. Is that something you have gotten to do lately?

Dan Matola: I really enjoy golfing. I never have as much time to do it as I would like. More recently, I've been coaching various sports for my children, which has kept me busy above and beyond work. At the end of the day, I'm a bit of a sports junkie, so I enjoy going to games or watching the Packers, Brewers, or Bucks when I can get some free time. With that trifecta of work, family, and sports, there is just not enough time in the week. Let's put it that way.

OT: What sports do your kids play that you're coaching?

DM: Right now, I'm coaching basketball. I was coaching soccer. This summer, I was helping out with baseball. Those sports just rotate throughout the year, so there's usually some practice that I need to be at. Otherwise, I'm a shuttle to and from practice.

OT: Yes. How old are your kids?

DM: Nine, seven, and five.

OT: Those are fun ages.

DM: They are. It keeps us busy. Lots of sports activities and other things that, between work and the home front, there's never a lot of quiet time for us.

OT: Are you originally from Milwaukee? Or did you move from somewhere else?

DM: No, I'm a lifer.

OT: Do you want to walk me through your role as a Senior Relationship Manager with RMB?

DM: Sure. My day-to-day title is Senior Relationship Manager, but what does that really mean? My responsibility with clients is to act as a quarterback for all of the moving parts of their financial situation. That encompasses investment advisory, wealth planning, accounting and reporting, and more. Our group offers a broad suite of Family Office Services that work well for complex situations. I would say on FOS, it's more of a coordinated approach because we need to bring in different team members depending on what the current issue is and then also incorporate outside providers like CPAs, estate planning attorneys, and insurance providers. My role is to navigate through all of that on a »

regular basis. It's a full-time job, as I like to tell people.

OT: You've been in this role for some time, right?

DM: Correct. I've basically had one career. I started in 2002 with Jacobus Wealth Management, Inc., a multi-client family office, working my way up to President and Chief Investment Officer. My main responsibility was serving as lead relationship manager for the largest clients of the firm. When we joined RMB Capital in 2017, I took a very similar role dedicated to the Family Office group and helped build out the service offering at RMB. It's the industry niche that I have focused on. I've enjoyed it. Twenty years is a long time to do something. You develop a unique skill set. Also, with some of the nuances of dealing with large, complex families, it's learning by doing. I have a lot of experience running into different, unique situations. We can then leverage that for other clients. I think that helps out, given the type of families we're working with.

OT: Did you take your first job expecting that this would be something you would stay with?

DM: I tell the story that I knew, from a pretty early age, that I wanted to get into the investment management side of the business. That's where my real passion was. When I went to UW-Whitewater for business school, I knew I wanted to be a finance major. Along the way, I became interested in real estate, estate planning, insurance, and other areas. When I joined a Family Office, I thought that it would be nice because I would

be able to get my hands into some different areas and then ultimately pick a career track that I wanted to be on.

The benefit of working in a Family Office is you get to be involved in a lot of those things all the time, so it's the best of both worlds. A big reason why I've never left is that I get a little taste of everything all the time. It keeps our team on our toes, and it keeps things interesting because every day is a little bit different, just depending on what's going on with clients or what's happening in the capital markets.

OT: Have you had a strategy or any overall principles that you've learned over the past two decades?

DM: I think for the role that I'm in, we have to be very customer service-oriented. That's an expectation that the families we're working with have. Solving problems and simplifying clients' lives are key objectives of ours. We try to be incredibly responsive. We try to problem-solve and bring forward best practices. We try to help alleviate pain points. Really, that's a big part of what the Family Office is all about.

OT: Do you think that's a benefit of working with an office like RMB that has a focus on strong personal relationships?

DM: I think that's absolutely right. There's a big peace of mind for the clients we're working with that we're just one call away and can help them in almost any given situation. ■

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