



Curi Capital and RMB Capital Complete Merger

CHICAGO & RALEIGH, N.C., Jan. 2, 2024 - Curi, a national healthcare advisory firm comprised of three distinct businesses: Curi Advisory, Curi Capital, and Curi Insurance, today confirmed the completion of its previously announced acquisition of RMB Capital and the merger between Curi Capital and RMB Capital ("RMB"), creating a registered investment advisory firm with more than \$11.3 billion in assets under advisement.¹ Terms were not disclosed.

Curi Capital CEO Dimitri Eliopoulos is now the CEO of the new combined entity, Curi RMB Capital. RMB founding partner and CEO Dick Burridge is the Executive Chairman and remains in his role as co-Chief Investment Officer. The leadership teams of both firms remain intact.

"The completion of the Curi Capital and RMB Capital merger is an energizing way to kick off 2024," said Jason Sandner, Curi's Chief Executive Officer. "The past 12 months have been truly transformational for our company, marked by strategic decisions and investments that have strengthened our ability to serve our clients, particularly our physician base and the broader healthcare community, in more ways and in more geographies than ever before."

"It's an exciting day for us to have this transaction completed, and it's just the beginning of our bright future together," said Eliopoulos. "We're eager to hit the ground running serving our clients as Curi RMB Capital. With our alignment on leadership, values, and culture plus our complementary strengths, we will continue to build on our combined legacies of putting clients at the center of everything we do."

"This merger is an important step for both firms," said Burridge. "The combined firm is able to move forward with permanent, long-term capital, which is a true differentiator in our industry. It ensures that we can make long-term decisions that will benefit both our employees and our clients for decades to come."

Curi RMB Capital is headquartered in Chicago. Curi Capital's former Raleigh headquarters are now an important office in the Southeast for the new combined entity. The firm has approximately 180 employees and expects to hire additional staff in 2024.

For more information about the merger between Curi Capital and RMB, please visit rmbcap.com/curi-rmb.

Forward-looking statements made in this press release, such as those related to the merger, potential post-merger performance, growth opportunities, integration, and our expectations and intentions that are not historical facts, reflect our current views with respect to future events and financial performance.

1. Total assets under advisement ("AUA") estimated as of 9/30/23. AUA presented here differs from regulatory assets under management ("RAUM") reported on RMB Capital's Form ADV and Curi Capital's Form ADV. For example, AUA includes, but is not limited to, private equity holdings, physical assets, retirement plan assets, and other non-traditional assets advised by RMB Capital and Curi Capital. Total AUA presented here is a combined number for both entities.

ABOUT CURI

Curi (curi.com) is a full-service advisory firm that serves more than 50,000 physicians, healthcare providers, and organizations across the U.S. Equal parts fierce healthcare advocates, smart business leaders, and thoughtful partners, Curi's advisory, capital, and insurance offerings deliver valued advice that is grounded in client priorities and elevated by their outcomes. From data-driven advisory services to private wealth offerings, to tailored insurance solutions and beyond, Curi delivers performance that is time-tested and trusted—in medicine, business, and life. Curi holds an "A" (Excellent) financial strength rating from AM Best.

ABOUT CURI CAPITAL

Curi Wealth Management, LLC, dba Curi Capital (curicapital.com), is a registered investment advisor, headquartered in Raleigh, N.C., that provides full-service financial advisory solutions, including personalized wealth management, retirement plan solutions, and investment guidance to high-net-worth individuals, ultra-high-net worth families, and businesses. Experienced and accessible, Curi Capital's advisors actively listen and proactively create tailored solutions that help clients build true wealth, however they define it. Curi Capital is registered with the U.S. Securities and Exchange Commission (SEC). Registration of an investment advisor does not imply any specific level of skill or training and does not constitute an endorsement of the firm by the SEC. A copy of Curi Capital's current written disclosure brochures, filed with the SEC, which discuss, among other things, Curi Capital's business practices, services and fees, are available through the SEC's website at: www.adviserinfo.sec.gov.

ABOUT RMB

RMB (rmbcap.com) is an independent advisory firm focused on helping clients achieve long-term goals. RMB brings in-house, institutional-quality investment expertise together with deep, holistic planning teams to deliver and implement customized strategies for each client. RMB serves individuals, family offices, and institutions.

Headquartered in Chicago, RMB also has offices in Denver; Jackson Hole, Wyo.; Lake Forest, Ill.; Milwaukee; Minneapolis; Oakbrook Terrace, Ill.; St. Joseph, Mich.; and Washington D.C. To learn more about RMB, visit rmbcapital.com.

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