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ROBERT HOLTON JOINS CLEARY GULL

Milwaukee, WI – July 1, 2014 Cleary Gull, an investment advisory firm focused on customized wealth management strategies for individuals and families welcomes Robert Holton as Vice President in their Private Client Group.

“Robert Holton is an excellent addition to our team,” said Brian Andrew, president and chief investment officer of Cleary Gull. “He brings a wealth of experience and embraces the firm’s focus on helping clients achieve their desired goals. We will continue to look for talented and experienced professionals like Robert as we grow our firm for the future.”

In his new role, Holton is responsible for client relationship development. Holton will advise individuals, business owners and organizations on effective and risk-sensitive asset management, and help them with the inherent complexities involved with intergenerational wealth management.

Most recently, he worked as Vice President of La Bri Group, where he managed a full spectrum of client wealth management services, with special emphasis on portfolio design and private equity opportunities. He previously was part of an equity ownership group in a specialty recruiting firm based in Milwaukee, WI. Holton received his MBA from Marquette University and a BA from the University of Minnesota, Twin Cities. He is currently a board member for The Center for Teaching Entrepreneurship.

“My move to Cleary Gull allows me to bring institutional-quality resources and investment programs to clients while providing family-office style consultation,” said Holton, who has a specialty niche of working with estate planning attorneys. “I see value in combining the sophisticated wealth and tax management needs of my clients with our proprietary ClearWealth® Services to build personalized investment portfolios which account for not only their needs, but accommodate the larger concerns involved in business ownership.”

About Cleary Gull

Cleary Gull (www.clearygull.com) is an employee-owned firm headquartered in Milwaukee, Wisconsin providing specialized financial services through two operating divisions: Investment Advisory and Investment Banking. Cleary Gull was named by Financial Times to their list of 2014 300 top registered investment advisors in the U.S. Cleary Gull has combined assets under management of \$2.5 billion as of December 31, 2013 and focuses on high net worth individuals, pilots, and not-for-profit hospitals and senior living communities across the nation. Cleary Gull’s investment bankers specialize in providing exclusive advice on sales, mergers, acquisitions, private debt and equity capital placement, typically for transactions from \$10 million to \$200 million.



About the 2014 *Financial Times* 300 Top Registered Investment Advisers List

The *Financial Times* solicited applications from more than 2,000 independent registered investment advisory firms. To be considered, advisers solicited by the *Financial Times* completed and submitted a questionnaire about their practice. Only those that completed the questionnaire were considered for the list. To qualify for the list, advisers must be registered with the SEC and have at least \$300 million in verified assets under management as of 12/31/13, with no more than 75% of a firm's assets being institutional. The *Financial Times* graded advisory firms that were considered for the list on six broad factors and calculated a numeric score for each advisor. Areas of consideration included AUM, AUM growth, years the firm has been in existence, industry certifications of staff, SEC compliance record, and online accessibility. The list is independently determined by the *Financial Times*. The registered investment advisory firms are not charged a fee for consideration or selection. *Being named to the "300 Top Registered Investment Advisers" list is not an endorsement and is not indicative of past or future performance.*

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