



# Beyond AUM Co-Founder Nima Tolooi Named One of Crain's 2019 Notable Entrepreneurs

*Crain's Chicago Business's list features 44 businesspeople in the city's startup scene*

CHICAGO, IL, USA, October 15, 2019 /EINPresswire.com/ -- [Nima Tolooi](#), co-founder of [Beyond AUM](#), has been named one of [Crain's Chicago Business's 2019 Notable Entrepreneurs](#). Crain's list of Notable Entrepreneurs features 44 businesspeople who have identified needs and untapped opportunities in the market; organized and run companies; and taken on greater-than-normal financial risk to achieve success. The list includes emerging companies with revenue or funding between \$500,000 and \$10 million.

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The Agency for Financial Advisory Firms

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*Nima Tolooi*

Founded in August 2017, Beyond AUM provides forward-thinking growth, marketing, and technology solutions to financial services firms, including wealth managers, financial planning firms, and registered investment advisors (RIAs). The agency's mission is to empower financial services firms to achieve world-class outcomes for their brands and professionals and drive success in the business far beyond assets under management (AUM), which is the standard measurement the industry uses to benchmark growth.

Like the personalized approach that fiduciary financial advisors typically use with their clients, Beyond AUM tailors strategies to firms' target demographics, current and prospective services, future goals, technology needs, and more. The result is an integrated business development, marketing, and technology roadmap that address challenges and streamlines workflows; enhances the end-user client experience; and positions firms for long-term, competitive success in the marketplace.

Previously, Nima served as the interactive marketing manager of Wipfli Hewins Investment Advisors (now Wipfli Financial Advisors), a national CPA-based wealth management firm, where he helped lead marketing, strategy, and technology initiatives. During his tenure, the firm's AUM grew to more than \$5 billion. Nima also helped cement the firm as an industry thought leader, featured in notable publications such as Forbes, Time, CNBC, Businessweek, Kitces.com, My Perfect Client, and Masters in Accounting. Through his industry experiences, Nima saw a need to bring other financial services firms into the digital age. Today, he empowers trusted, fiduciary advisors to better serve their clients and communicate their value through compelling content, unique digital experiences, and fintech solutions.

Nima is also the founder of Room to Grow, which recently was named one of Chicago's Best Coworking Spaces by Travel Magazine. Room to Grow provides resources, networking

opportunities, and best-practice advice to many local startups and entrepreneurs.

#### About Beyond AUM

Beyond AUM is an agency that provides field-tested, data-driven marketing, growth, technology, and digital experience solutions to financial services firms across the nation, including wealth managers, financial planning firms, and RIAs. Beyond AUM has been featured in Financial Advisor magazine and Financial Planning magazine for its work in helping advisory firms scale to achieve next-level growth in their practices. To learn more, visit [beyondaum.com](http://beyondaum.com).

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Nima Tolooi - Co Founder, Beyond AUM

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