WILLARDPOWELL

Talent market report · Data pulled September 25, 2026 · 37 LinkedIn profiles

Thirty-seven bankers, sixteen banks.

Every relationship manager and market leader in this dataset started a new commercial or middle-market banking role between June and September 2026. Read together, the moves show who is hiring, who is losing people, which title bands are being used to win them, and which markets are being staffed up.

37 bankers who moved

16 destination banks

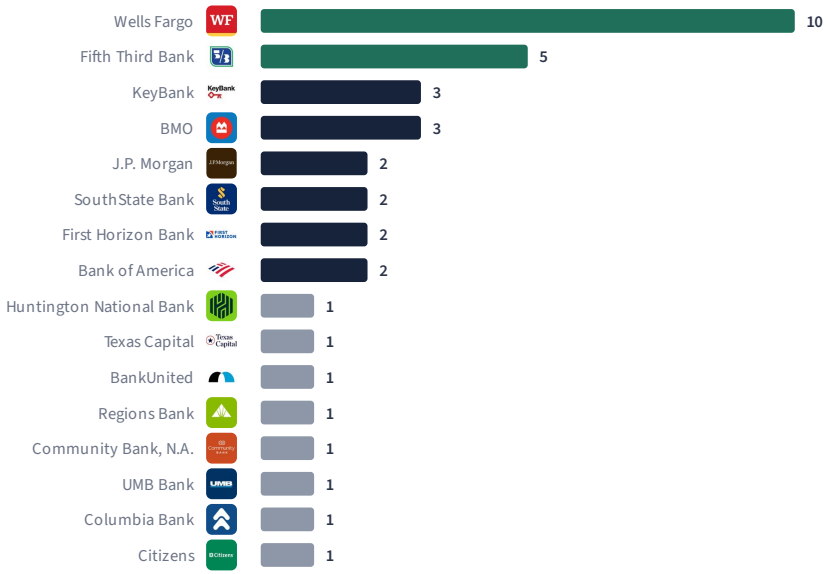
10 landed at Wells Fargo

15 ED / MD-level titles

8 left Bank of America

Where they landed

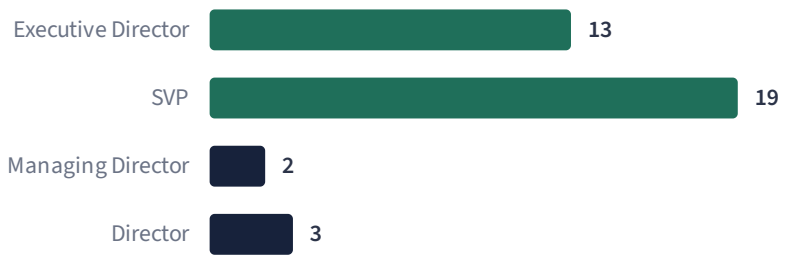
Wells Fargo accounts for 10 of the 37 moves, more than a quarter of the cohort, all under Commercial Banking titles ranging from Senior Lead Relationship Manager to Division Lead. Fifth Third is the second-largest recruiter with 5 hires, three of them in Texas and Southern California, consistent with its Sun Belt expansion. KeyBank and BMO each added three. 8 banks made a single hire.



BMO and BMO Commercial Bank are counted together. Bar colour: green = 5 or more hires, navy = 2–4, grey = single hire.

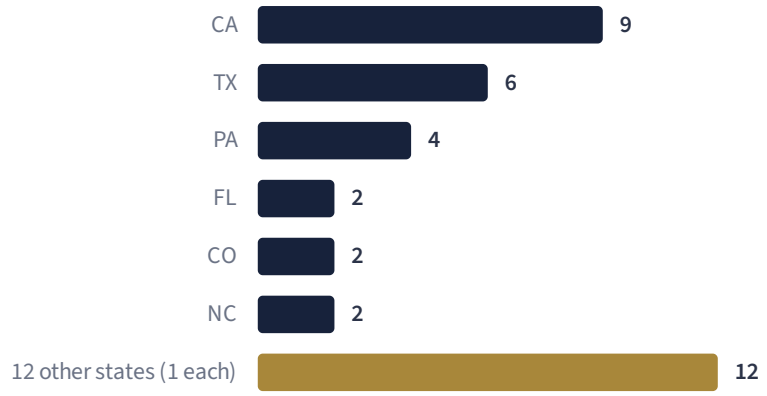
Title bands used to hire

Executive Director is now the dominant senior individual-contributor title at Wells Fargo and J.P. Morgan, and it accounts for 13 of the 37 moves. SVP remains the standard band at regional banks. Only two moves carry a Managing Director title, both in Los Angeles.



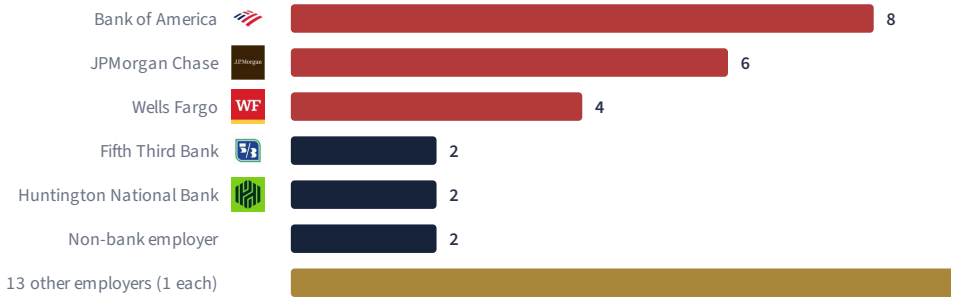
Markets being staffed

California (9) and Texas (6) together hold 15 of the 37 moves. Dallas–Fort Worth alone accounts for five, with Wells Fargo, Huntington and SouthState all adding senior bankers there. Pennsylvania is the third-deepest market at four, split between Pittsburgh, Philadelphia and the Lehigh Valley.



Where they came from

Prior employer is now confirmed for all 37 movers. Bank of America is the largest single source, losing 8 bankers to seven different banks, followed by JPMorgan Chase (6) and Wells Fargo (4). Two bankers returned to banking from non-bank roles (a healthcare consultancy and a real estate sponsor), and one (Tom Landers) returned to a former employer.



Red = 4 or more departures. JPMorgan Chase includes J.P. Morgan and Chase; Bank of America includes Merrill Lynch entities.

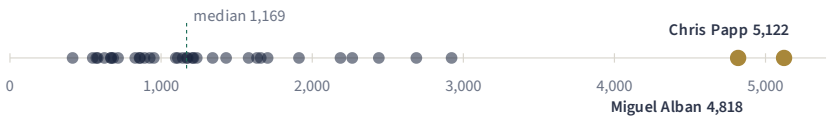
Net talent flow by bank

Hires in, departures out and net change for every bank that appears at least twice in the data. Wells Fargo is the clear net winner; Bank of America and JPMorgan Chase fund most of the market's movement.

Bank	In	Out	Net
Wells Fargo	10	4	+6
Fifth Third Bank	5	2	+3
KeyBank	3	0	+3
BMO	3	0	+3
SouthState Bank	2	0	+2
First Horizon Bank	2	1	+1
Huntington National Bank	1	2	-1
JPMorgan Chase	2	6	-4
Bank of America	2	8	-6

Network reach

Median LinkedIn network across the cohort is 1,169 connections. Two bankers, Chris Papp (Regions, Tampa) and Miguel Alban (KeyBank, Philadelphia), sit far above the group at roughly 5,000, which matters for banks relying on new hires to bring a book of introductions rather than a portfolio.



What this means if you are hiring

Wells Fargo is the competitor to plan around. Ten senior hires against four departures is a net gain of six, all hires carrying the Executive Director title. It is pulling from JPMorgan Chase (three), Bank of America, Truist, Citi, Webster and Northern Trust, and is also the only bank in the set re-hiring its own alumni (Richard Toft) and recruiting from outside banking.

Bank of America and JPMorgan Chase are the source pools. Fourteen of the 37 movers left one of the two, and both are net losers (Bank of America −6, JPMorgan Chase −4). Regional and super-regional banks (Fifth Third, KeyBank, BMO, First Horizon, SouthState) are the main beneficiaries.

The Executive Director title is a recruiting tool. Several Wells Fargo hires moved up two title bands on arrival (VP to Executive Director for Yvette Lee, Kevin Ma and Josh Picchetti); regional banks still hire at SVP.

Texas and Southern California are the contested markets. Fifth Third, SouthState, Huntington, Texas Capital and Wells Fargo all placed people in DFW, Houston or LA/Orange County. Expect further movement here as newly hired market presidents (Rothamel, Green, McGrenehan) build out their own teams.

Healthcare specialists are moving as a subgroup. Three of the 37 are dedicated healthcare bankers (Kim, Senuta, Cone), one of them a Managing Director with national coverage, which suggests specialty verticals are being staffed as aggressively as generalist coverage.

Banker bios

One page per banker, drafted from the full LinkedIn experience record: prior employers and tenures, stated focus, skill endorsements, credentials, recognition and community roles. Initials stand in where no photo is public.

Karla Barron

Executive Director, Commercial Banking – South Central Division Lead

Wells Fargo

Education
BBA Finance, Southern Methodist University

linkedin.com/in/karla-bucio-barron

Banker 1 of 37

Previously
JPMorganChase
Executive Director, Branch Expansion & One Chase Strategy

→

Joined Jun 2026
Wells Fargo
Executive Director, Commercial Banking – South Central Division Lead

Dallas–Fort Worth, TX	Executive Director	1,341	Jun 2026
Market	Title band	LinkedIn connections	Start date

Karla joined Wells Fargo in June 2026 as Executive Director and South Central Division Lead for Commercial Banking, based in Dallas. The role puts her in charge of a multi-market commercial banking division at a time when Wells Fargo is rebuilding its middle-market coverage bench across Texas.

She arrives after a 24-year career at JPMorganChase that ran the full width of the bank: credit analyst and underwriter in asset-based lending (2002–2007), Business Finance Manager and then Central Region CFO for the U.S. Private Bank (2008–2021), CFO for Community and Business Development (2021–2024), and finally Executive Director for Branch Expansion and the One Chase strategy. That combination of credit, finance leadership and enterprise strategy is unusual for a division-lead seat and signals a business-management rather than pure-production profile.

Her profile emphasizes strategy, financial performance and organizational transformation, with a stated commitment to developing talent and building collaborative teams. She holds a BBA in Finance from Southern Methodist University (2002).

Skills & endorsements

Management · Financial Analysis · Finance · Leadership · Banking · Strategic Planning

Tom Landers

Senior Vice President, Commercial Banking

KeyBank

Education
BS University of Oregon; MBA Finance, Portland State

linkedin.com/in/tom-landers-122a3b16

Banker 2 of 37

Previously
JPMorganChase
Commercial Banker

→

Joined Jun 2026
KeyBank
Senior Vice President, Commercial Banking

Portland, OR	SVP	1,214	Jun 2026
Market	Title band	LinkedIn connections	Start date

Tom returned to KeyBank in June 2026 as Senior Vice President, Commercial Banking in Portland, Oregon, fifteen years after his first stint there as a Relationship Manager (2011–2012), when he ranked in the top 3% of more than 1,000 RMs nationally on total productivity.

The intervening years were spent almost entirely at JPMorgan Chase, first as a Business Banking Area Manager running a 12-person team covering the state of Oregon (clients of $3–30MM revenue, credit up to $10MM), where his team finished first of 52 in the Greater West Division and he won President's Club as both an RM (2013–2016) and Area Manager (2018). He moved into Commercial Banking in 2019, took a short detour as Managing Director at First Republic in 2023 during its wind-down, and rejoined JPMorgan Chase Commercial Banking until his move to Key. Earlier, he was a top-performing Business Banker at U.S. Bank (2007–2011).

Tom describes himself as an outgoing, analytical banker whose strongest track record is in lending and equipment finance. He holds a BS from the University of Oregon (double major, completed in four years) and an MBA in Finance from Portland State.

Skills & endorsements

Loans · Customer Service · Analytical Skills · Employee Engagement · Finance · Banking

Recognition

- President's Club, JPMorgan Chase (2013–2016, 2018)

Peter De Rosa

Executive Director, Commercial Banking

Wells Fargo

Education
—

linkedin.com/in/peter-de-rosa-65895b15

Banker 3 of 37

Previously
Webster Bank →
Senior Managing Director, Middle Market Banking

Joined Aug 2026
Wells Fargo
Executive Director, Commercial Banking

Long Island / NYC, NY	Executive Director	2,441	Aug 2026
Market	Title band	LinkedIn connections	Start date

Peter joined Wells Fargo as Executive Director, Commercial Banking in August 2026, covering the Long Island and New York market. He moves from Webster Bank, where he spent 16 months as Senior Managing Director of Middle Market Banking.

Before Webster he built an eight-year run at Bank of America, rising from Vice President to Senior Vice President in Commercial Banking (2017–2025). Earlier stops trace a classic Long Island business-banking path: Vice President at M&T Bank, Business Banking Team Leader at Bethpage Federal Credit Union, SVP of Business Banking at Capital One, and five years as a Business Relationship Manager at JPMorgan Chase.

His LinkedIn skill endorsements are among the deepest in the cohort, led by Small Business Lending (73), Commercial Banking (99+), Commercial Lending (54), Banking (54) and Credit (42), reflecting a long client-facing lending career. He has 2,400+ connections.

Skills & endorsements

- Commercial Banking
- Small Business Lending
- Commercial Lending
- Credit
- Lines of Credit
- Asset Based Lending
- Treasury Services
- Portfolio Management

CY

Chu Yi

Executive Director, Middle Market & Specialized Industries

J.P. Morgan

Education
MBA George Washington University; BA William & Mary

Languages
Korean

linkedin.com/in/chu-yi-8a690010

Banker 4 of 37

Previously
Bank of America
SVP, Commercial Banking Group (10 yrs)

→

Joined Aug 2026
J.P. Morgan
Executive Director, Middle Market & Specialized Industries

Washington, DC, VA	Executive Director	1,659	Aug 2026
Market	Title band	LinkedIn connections	Start date

Chu joined J.P. Morgan in August 2026 as Executive Director for Middle Market & Specialized Industries in the Greater Washington market, based in McLean, Virginia.

He leaves Bank of America after ten years as Senior Vice President in the Commercial Banking Group (2016–2026). Before that he spent six years as VP in PNC's Commercial Banking Group (2010–2016) and a decade at Wachovia as a VP and Senior Business Banker (2000–2010), having started as an assistant branch manager at First Virginia Bank in 1998. That is 28 years of continuous D.C.-area coverage across four franchises.

Endorsements concentrate on Commercial Lending (61), Commercial Banking (58), Loans (41), Banking (40) and Credit (37), with additional depth in treasury management, credit risk and underwriting. He holds an MBA in Finance and International Business from George Washington University (cum laude) and a BA from William & Mary, and lists Korean as a language.

Skills & endorsements

Commercial Lending · Commercial Banking · Credit Analysis · Small Business Lending · Treasury Management · Credit Risk · Risk Management · Financial Analysis

Marc Farmer

Executive Director, Commercial Banking (Upper Middle Market)

Huntington National Bank

Education
Accounting & Finance, UT Dallas (cum laude)

linkedin.com/in/marcfarmer

Banker 5 of 37

Previously
Texas Capital
Executive Director, Middle Market Banking

→

Joined Aug 2026
Huntington National Bank
Executive Director, Commercial Banking (Upper Middle Market)

Dallas–Fort Worth, TX	Executive Director	2,265	Aug 2026
Market	Title band	LinkedIn connections	Start date

Marc joined Huntington National Bank in Dallas in August 2026 as Executive Director in Upper Middle Market Banking, one of Huntington's senior Texas expansion hires. He comes from Texas Capital, where he was Executive Director in Middle Market Banking (2024–2026), after seven years as SVP in Middle Market Commercial Banking at UMB Bank (2017–2024) and a decade as Vice President at Comerica (2006–2016).

His coverage centers on privately held, family-owned and sponsor-backed manufacturing, distribution and B2B services companies in the $25MM–$1B revenue range, with work spanning acquisition financing, working capital, treasury and deposit strategy and ownership-transition planning. Before banking he spent 13 years in wholesale distribution as a category manager and buyer for Safeway/Randalls and Fleming Foods, which he credits for an operator's mindset on client situations.

Endorsements are led by Middle Market (84), Commercial Banking (99+), Loans (68) and Finance (65), with Mergers & Acquisitions (38) and Networking (34). He graduated from UT Dallas with a 4.0 in Accounting and Finance (cum laude) and lists an MBA in process.

Skills & endorsements

Middle Market · Commercial Banking · Mergers & Acquisitions · Loans · Business Development · Credit Analysis · Negotiation · Leadership

Community

- Board Member, Business Navigators DFW (2019–2020)
- Class Facilitator, Financial Peace University (2005–present)

EK

Eul Kim

Managing Director, Healthcare

Texas Capital

Education
UCLA

linkedin.com/in/ekim80

Banker 6 of 37

Previously
Fifth Third Bank
SVP, Middle Market Healthcare

→

Joined Aug 2026
Texas Capital
Managing Director, Healthcare

Los Angeles, CA	Managing Director	1,912	Aug 2026
Market	Title band	LinkedIn connections	Start date

Eul joined Texas Capital in August 2026 as Managing Director, Healthcare, with national coverage of private, public and sponsor-backed healthcare companies. The mandate covers growth, M&A and recapitalization financings across cash-flow, leveraged, asset-based and real estate structures.

He leaves Fifth Third's Middle Market Healthcare team in Los Angeles after under two years covering California healthcare companies of $20–500MM revenue. Before that he was a founding team member and sole originator of Bank of Hope's Healthcare Corporate Banking Group (2021–2024), building a $550MM portfolio with zero losses, and spent 16 years at Wells Fargo Capital Finance – Healthcare Finance, rising from Analyst to Managing Director. In that role his team executed 30+ transactions and more than $1.8B in new commitments, including joint lead arranger on an $850MM ABL revolver supporting a merger of two public specialty healthcare providers.

Skill endorsements skew toward the structured-finance end of the market: Corporate Finance (24), Portfolio Management (20), Financial Modeling (11), Private Equity, Leveraged Finance and Restructuring. He attended UCLA and received Wells Fargo Wholesale Banking's Golden Spoke Award in 2015.

Skills & endorsements

Corporate Finance · Portfolio Management · Financial Modeling · Private Equity · Leveraged Finance · Restructuring · Capital Markets · Valuation

Recognition

- Golden Spoke Award, Wells Fargo Wholesale Banking (2015)

Jason Rothamel

SVP, Market President – Corporate / Middle Market Banking

BankUnited

Education
BS West Point; MBA Finance, Villanova

linkedin.com/in/jason-rothamel-a04a2b3b

Banker 7 of 37

Previously
TD
SVP, Commercial Banking – Regional Vice President, Orlando

→

Joined Jun 2026
BankUnited
SVP, Market President – Corporate / Middle Market Banking

Orlando, FL	SVP	1,236	Jun 2026
Market	Title band	LinkedIn connections	Start date

Jason took the SVP and Market President seat for Corporate and Middle Market Banking at BankUnited in Orlando in June 2026, giving him responsibility for the Central Florida commercial franchise as well as his own client coverage.

He moves from TD, where he had been SVP and Regional Vice President for Commercial Banking in Greater Orlando since 2024, following commercial relationship-manager roles for TD in the New York metro (2021–2024) and business and commercial banking roles at Wells Fargo in Princeton, New Jersey (2018–2021). He began his finance career as an Associate in Wealth Management FP&A at JPMorgan Chase after a short operations role at Proskauer Rose.

Before banking Jason served four years as a Captain in the U.S. Army (Armor) at Fort Wainwright, Alaska. He is a West Point graduate (BS, International Relations, 2012) with an MBA in Finance from Villanova. His skills list is broad rather than deep, spanning commercial real estate, letters of credit, credit risk management and team leadership.

Skills & endorsements

- Commercial Banking
- Commercial Real Estate
- Commercial Lending
- Credit Risk Management
- Letters of Credit
- Team Leadership

Ryan Wark

SVP, Middle Market Banking Relationship Manager

SouthState Bank

Education
BBA Finance & Management, Grand Valley State

linkedin.com/in/ryan-wark-38128648

Banker 8 of 37

Previously
Huntington National Bank
SVP, Sr. Relationship Manager (via Veritex acquisition)

→

Joined Jun 2026
SouthState Bank
SVP, Middle Market Banking Relationship Manager

Dallas–Fort Worth, TX	SVP	1,635	Jun 2026
Market	Title band	LinkedIn connections	Start date

Ryan joined SouthState Bank in Dallas in June 2026 as SVP and Middle Market Banking Relationship Manager, part of SouthState's build-out of its Texas middle-market platform.

His route to SouthState ran through Huntington, which he joined via its 2025 acquisitions of Veritex and Cadence; he had been SVP, Middle Market Specialty Banking at Veritex Community Bank since 2022. Before Veritex he was a VP Middle Market RM at CIT (2021–2022) and spent five years at Texas Capital Bank moving from credit underwriting through portfolio management (Corporate Banking and Branded Retail Franchise Finance) to a special-assets role during 2020. He started at Macatawa Bank in Michigan as a commercial credit analyst (2011–2016).

That progression, credit analyst to underwriter to portfolio manager to RM, shows on his skills list, which is led by Credit (13), Finance (11), Loans (11) and Credit Analysis. He holds a BBA in Finance and Management from Grand Valley State University.

Skills & endorsements

Credit · Credit Analysis · Credit Risk · Underwriting · Commercial Lending · Loans · Finance · Commercial Banking

Jonathan Mata

Senior Vice President, Middle Market Banking

Fifth Third Bank

Education
BA UCLA; MBA Purdue

linkedin.com/in/jonathan-mata-2a309062

Banker 9 of 37

Previously
Bank of America
SVP, Global Banking

→

Joined Jul 2026
Fifth Third Bank
Senior Vice President, Middle Market Banking

Los Angeles, CA	SVP	952	Jul 2026
Market	Title band	LinkedIn connections	Start date

Jonathan joined Fifth Third Bank in July 2026 as Senior Vice President, Middle Market Banking, based in the Long Beach / Los Angeles area, one of three Southern California hires strengthening Fifth Third's West Coast middle-market presence.

He moves from Bank of America, where he spent just under two years as Senior Vice President in Global Banking (2024–2026). Before that he was a Wells Fargo lifer: 19 years as Senior Vice President in Commercial Banking (2005–2024), which makes him one of the longest single-employer tenures in this cohort and explains why endorsements come from colleagues at both Wells Fargo and Bank of America.

Endorsements cluster around Commercial Lending (10), Credit Analysis (6), Loans (5) and Commercial Banking, with additional listings in asset-based lending, small business lending and loan origination. He holds a BA from UCLA and an MBA from Purdue University.

Skills & endorsements

- Commercial Lending
- Credit Analysis
- Loans
- Commercial Banking
- Asset Based Lending
- Small Business Lending

Chris Papp

Senior Vice President, Commercial Banking Leader

Regions Bank

Education
BS Finance & Economics, University of South Florida

Credentials
Lean Six Sigma Yellow Belt (TD, 2018)

linkedin.com/in/pappchris

Banker 10 of 37

Previously
First Horizon Bank →
SVP, Commercial Middle Market Banking

Joined Jul 2026
Regions Bank
Senior Vice President, Commercial Banking Leader

Tampa Bay, FL	SVP	5,122	Jul 2026
Market	Title band	LinkedIn connections	Start date

Chris leads a commercial banking team at Regions Bank in Greater Tampa Bay, taking the Senior Vice President, Commercial Banking Leader role in July 2026. The move is a step up from producer to team leader.

He comes from First Horizon, where he was SVP in Commercial Middle Market Banking for two years (2024–2026), after an eight-year run as Senior Relationship Manager in TD's Tampa middle-market group (2016–2024). Earlier stops trace 23 years in Tampa Bay banking: Vice President at Hancock Whitney (2012–2016), Asset Resolution Manager working out problem CRE and commercial assets at PNC (2010–2012), Business Services Officer at BB&T (2009–2010), and six years at SunTrust, where he completed the Commercial Associate Training Program and rose to AVP Relationship Manager (2003–2009).

His endorsement profile is the deepest in the group: Commercial Lending (99), Commercial Banking (71), Portfolio Management (62), Loans (56), Banking (52) and Finance (44). A Tampa native, Eagle Scout and USF honors graduate, he holds a Lean Six Sigma Yellow Belt from TD and serves on the advisory board of First Tee – Tampa Bay and as a Scouting merit-badge counselor.

Skills & endorsements

Commercial Lending · Commercial Banking · Portfolio Management · Loans · Financial Analysis · Commercial Real Estate · Treasury Management · Risk Management

Recognition

- Eagle Scout

Community

- Advisory Board, First Tee – Tampa Bay (2024–present)
- Committee Member, Gulf Ridge Council BSA (2023–present)

JN

Josh Newsom

Senior Vice President, Commercial Banking

First Horizon Bank

Education
BBA Finance, Mississippi State; Graduate School of Banking at LSU

Credentials
Graduate School of Banking at LSU (2022)

linkedin.com/in/josh-newsom-b5334a87

Banker 11 of 37

Previously
Southern Bancorp
Market President

→

Joined Jun 2026
First Horizon Bank
Senior Vice President, Commercial Banking

Memphis, MS	SVP	580	Jun 2026
Market	Title band	LinkedIn connections	Start date

Josh joined First Horizon Bank in June 2026 as Senior Vice President, Commercial Banking, covering the Memphis / North Mississippi market from Olive Branch.

He arrives from Southern Bancorp, a community development bank, where he spent seven years rising from SVP Commercial Lender (2019) to City President for Olive Branch (2020–2025) and then Market President (2025–2026). Before that he was Senior Vice President and Branch Manager at Community Bank of Mississippi (2014–2019) and an AVP Branch Manager at Regions Bank (2009–2014), the source of most of his skill endorsements.

The move from market president at a community bank to a producing SVP seat at a super-regional is a common pattern in this cohort. Josh holds a BBA in Finance from Mississippi State University and completed the Mississippi School of Banking and the Graduate School of Banking at LSU (2022).

Skills & endorsements

Commercial Banking · Credit Analysis · Commercial Lending · Customer Service · Loans · Small Business Lending

CR

Chris Ross

SVP, Commercial Relationship Manager III

SouthState Bank

Education
Colorado State University

linkedin.com/in/chris-ross-4832aa7

Banker 12 of 37

Previously
U.S. Bank
SVP, Global Industrials & Services (Middle Market)

→

Joined Jun 2026
SouthState Bank
SVP, Commercial Relationship Manager III

Denver / Fort Collins, CO	SVP	2,187	Jun 2026
Market	Title band	LinkedIn connections	Start date

Chris joined SouthState Bank in June 2026 as SVP and Commercial Relationship Manager III, working hybrid out of Fort Collins, Colorado, and covering C&I middle-market and not-for-profit clients across payables, receivables, treasury, investments and credit.

He leaves U.S. Bank after twelve and a half years as Senior Vice President in the Global Industrials and Services group, managing Denver middle-market relationships with $25MM–$1B in revenue across acquisition, equipment and cash-flow financing plus treasury, FX and derivatives. Before that he ran West Regional Treasury Management Sales for UMB Bank in Denver and Phoenix (2007–2013) and spent eight years at KeyCorp as VP Senior Treasury Advisor, Area Retail Leader and Sales Manager (1999–2007). His career began in 1989 in commercial real estate at United Banks of Colorado / Norwest.

With 37 years in financial services he is the most tenured banker in the cohort, and his endorsement profile reflects his treasury roots: Treasury Management (47), Banking (53), Commercial Banking (43), Treasury (27), Loans (26) and Credit Analysis (25). He attended Colorado State University, sits on the board of The Salvation Army (since 2017) and spent a decade as an honorary board member of Metro Denver Partners.

Skills & endorsements

Treasury Management · Commercial Banking · Banking · Cash Management · Credit Analysis · Portfolio Management · Commercial Lending · Relationship Management

Community

- Board Member, The Salvation Army (2017–present)
- Honorary Board, Metro Denver Partners (2003–2013)

Daniel McGrenehan

SVP, Commercial Market Executive

Community Bank, N.A.

Education
Rowan College of South Jersey

linkedin.com/in/daniel-mcgrenehan-407635133

Banker 13 of 37

Previously
M&T Bank
SVP, Senior Relationship Manager – Middle Market

→

Joined Aug 2026
Community Bank, N.A.
SVP, Commercial Market Executive

Lehigh Valley, PA	SVP	572	Aug 2026
Market	Title band	LinkedIn connections	Start date

Daniel joined Community Bank, N.A. in August 2026 as SVP and Commercial Market Executive for the Lehigh Valley, a market-leadership hire as the bank extends its Pennsylvania commercial footprint.

He moves from M&T Bank, where he was SVP and Senior Relationship Manager for Middle Market in the Lehigh Valley (2024–2026). Before M&T he spent nearly five years at Truist / BB&T as Vice President and Business Services Officer in Mount Laurel, New Jersey (2019–2024), was Vice President of Commercial Lending at Fulton Financial (2016–2019) and a VP Senior Relationship Manager at Wells Fargo covering Philadelphia and Southern New Jersey (2013–2016). He started at Bank of America in 2002 as a personal banker, progressing to AVP Branch Manager and then VP Small Business Banking over eleven years.

That retail-to-commercial path across six franchises gives him broad regional relationships in the Philadelphia–Lehigh Valley corridor. Listed skills span commercial banking and lending, credit analysis, real estate, risk management and portfolio management. He attended Rowan College of South Jersey.

Skills & endorsements

Commercial Banking · Commercial Lending · Credit Analysis · Real Estate · Risk Management · Portfolio Management

MG

Marcos Garza

Executive Director, Commercial Banking Leader

Wells Fargo

Education
Engineering Management Information Systems, SMU

linkedin.com/in/marcos-garza-wellsfargo

Banker 14 of 37

Previously
Truist
Senior Vice President, Dallas

→

Joined Jun 2026
Wells Fargo
Executive Director, Commercial Banking Leader

Dallas–Fort Worth, TX	Executive Director	1,207	Jun 2026
Market	Title band	LinkedIn connections	Start date

Marcos leads a team of Wells Fargo bankers serving the Emerging Middle Market across Dallas–Fort Worth and East Texas, stepping into the Executive Director, Commercial Banking Leader role in June 2026.

He arrives from Truist, where he was Senior Vice President in Dallas (2024–2026), following two years as SVP at Dallas Capital Bank (2022–2024). The bulk of his career was 16 years at JPMorgan Chase in DFW, moving from AVP Business Banking (2006) through Business Relationship Manager roles to Vice President, Commercial Banking (2020–2022), which is where most of his endorsements originate.

He describes a disciplined approach to credit, risk management and treasury strategy and a collaborative leadership style focused on developing high-performing teams. Endorsements cover Banking, Credit, Financial Analysis (8 each), Loans, Mortgage Lending and Credit Analysis. He studied Engineering Management Information Systems at SMU.

Skills & endorsements

Banking · Credit · Financial Analysis · Loans · Credit Analysis · Commercial Lending · Relationship Management

David Servatius

Senior Vice President, Commercial Relationship Manager

UMB Bank

Education
BBA Finance, University of San Diego

Languages
Spanish

Credentials
Certified Exit Planning Advisor (CEPA), 2025

linkedin.com/in/david-servatius-9a398065

Banker 15 of 37

Previously
Bank of America
SVP, Senior Relationship Manager – Emerging Growth / ESOP Advisor

→

Joined Jul 2026
UMB Bank
Senior Vice President, Commercial Relationship Manager

Denver, CO	SVP	683	Jul 2026
Market	Title band	LinkedIn connections	Start date

David joined UMB Bank in Denver in July 2026 as Senior Vice President and Commercial Relationship Manager, adding to UMB's Colorado commercial coverage.

He leaves Bank of America after nearly seven years as SVP and Senior Relationship Manager in Denver covering emerging-growth and lower-middle-market companies and serving as ESOP Regional Advisor (2019–2026). Before that he spent six years at JPMorgan Chase as VP Senior Relationship Manager in Government and Not-for-Profit Banking (2013–2019) and four at Wells Fargo, where he completed the bank's five-month credit training program and worked as a Portfolio Manager in Healthcare Financial Services (2009–2013). He began as an investment banking analyst at Harvey & Company in Newport Beach, working with private equity groups on growth investments and recapitalizations (2005–2008).

He is a Certified Exit Planning Advisor (CEPA, 2025) and has served on the Denver Advisory Board of The CFO Leadership Council since 2023, consistent with an owner-transition and ESOP advisory focus. He lists Spanish as a skill and holds a BBA in Finance from the University of San Diego, with a semester in Madrid.

Skills & endorsements

Exit Planning | Commercial Relationship Management | Spanish-speaking

Community

- Denver Advisory Board, The CFO Leadership Council (2023–present)

Kyle Loing

Director, Commercial Banking Relationship Manager

BMO

Education
BS Real Estate, St. Cloud State (magna cum laude); MBA, UW–La Crosse

linkedin.com/in/kyle-loing-66162a23

Banker 16 of 37

Previously
Wells Fargo
VP, Commercial Relationship Manager

→

Joined Jun 2026
BMO
Director, Commercial Banking Relationship Manager

Minneapolis–St. Paul, MN	Director	829	Jun 2026
Market	Title band	LinkedIn connections	Start date

Kyle joined BMO in the Twin Cities in June 2026 as Director and Commercial Banking Relationship Manager.

He is a 19-year Wells Fargo veteran, having joined in 2007 as a Store Manager (District Coach of the Year 2009, District MVP 2008) and progressed through Branch Manager, Business Sales Consultant for merchant services, Business Relationship Manager, Senior and Principal Business RM, and finally VP Commercial Relationship Manager in St. Paul (2020–2026). His departure is one of four Wells Fargo losses in this cohort, offsetting part of the bank's ten senior hires.

His endorsements are sales-oriented: Sales (19), Sales Management (10), Retail Banking, Merchant Services and Commercial Card, alongside commercial banking and portfolio management. He holds an MBA from the University of Wisconsin–La Crosse and a BS in Real Estate from St. Cloud State University (magna cum laude, SIOR Scholarship).

Skills & endorsements

Sales · Sales Management · Relationship Management · Commercial Banking · Merchant Services · Commercial Card · Business Analysis · Negotiation

Recognition

- Magna cum laude; SIOR Scholarship, St. Cloud State

Kevin Ma

Executive Director, Senior Lead Commercial Banking Relationship Manager

Wells Fargo

Education
Business Management, CUNY Queensborough

Languages
Mandarin (native), English (native), Cantonese (professional)

linkedin.com/in/kevinmab2b

Banker 17 of 37

Previously
JPMorgan Chase
VP, Senior Business Relationship Manager

→

Joined Jul 2026
Wells Fargo
Executive Director, Senior Lead Commercial Banking Relationship Manager

Dallas–Fort Worth, TX	Executive Director	1,169	Jul 2026
Market	Title band	LinkedIn connections	Start date

Kevin moved into the Executive Director, Senior Lead Commercial Banking Relationship Manager seat at Wells Fargo in Dallas–Fort Worth in July 2026.

He comes from JPMorgan Chase, where he was VP and Senior Business Relationship Manager in DFW (2023–2026). His career has been largely at JPMorgan Chase in two stints: Associate Banker, Relationship Banker and Private Client Banker in New York (2008–2017), Business Banking Relationship Manager (2017–2021) and the DFW roles from 2022. In between he spent nine months as SVP B2B Sales Manager for Revolut's U.S. business banking launch in Plano (2021–2022), the only fintech stop in the cohort.

He is trilingual, native in Mandarin and English with professional working proficiency in Cantonese, which he positions as an asset for cross-border coverage. Endorsements lead with Sales (11), Customer Service (9), Management (8) and Leadership (6). He studied Business Management at CUNY Queensborough.

Skills & endorsements

Sales · Relationship Building · Credit · Cash Management · Leadership · Management · Regulatory Requirements

MP

Mark Parrott

Executive Director, Relationship Executive – Emerging Middle Market

J.P. Morgan

Education
Marketing & Management, Darla Moore School of Business (USC)

linkedin.com/in/mark-parrott-108b9a9

Banker 18 of 37

Previously
PNC
SVP, Corporate & Institutional Banking

→

Joined Jul 2026
J.P. Morgan
Executive Director, Relationship Executive – Emerging Middle Market

Upstate South Carolina, SC	Executive Director	414	Jul 2026
Market	Title band	LinkedIn connections	Start date

Mark joined J.P. Morgan in July 2026 as Executive Director and Relationship Executive in Emerging Middle Market Commercial Banking, covering core C&I companies in the Upstate of South Carolina with $20–100MM in annual revenue.

He leaves PNC after nine and a half years as Senior Vice President in Corporate & Institutional Banking in Greenville (2017–2026). Before PNC he was a Commercial Relationship Manager and Commercial Portfolio Manager at TD (2013–2016) and spent nine years at BB&T, first as a Certified Business Services Officer handling $1–10MM credits and then as Portfolio Risk Officer supporting $204MM of commitments across the Spartanburg and Greer markets and leading the Upstate region's CCAR data submission (2004–2013). He started in sales at The Delta Group.

That credit-risk foundation shows in a credit-heavy endorsement profile: Commercial Banking, Credit, Underwriting, Credit Risk, Portfolio Management and Financial Risk. A graduate of the Darla Moore School of Business at USC, he serves on the board of the Roper Mountain Science Center and spent nine years on the board of the Upcountry History Museum.

Skills & endorsements

Commercial Banking · Credit · Underwriting · Credit Risk · Portfolio Management · Financial Analysis · Risk Management

Community

- Board Member, Roper Mountain Science Center (2024–present)
- Board Member, Upcountry History Museum (2016–2025)

Chris Weeks

Senior Vice President, Relationship Manager – Middle Market

Fifth Third Bank

Education
BA Economics & English, UNC Chapel Hill

Credentials
FINRA Series 7 and Series 63

linkedin.com/in/chris-weeks-2541ba90

Banker 19 of 37

Previously
Western Alliance Bank →
SVP, Relationship Manager

Joined Jul 2026
Fifth Third Bank
Senior Vice President, Relationship Manager – Middle Market

Phoenix, AZ	SVP	1,111	Jul 2026
Market	Title band	LinkedIn connections	Start date

Chris joined Fifth Third Bank in Phoenix in July 2026 as Senior Vice President, Relationship Manager in Middle Market Commercial Banking, covering businesses with $50MM–$1B+ in sales across lending, treasury, equipment finance, ABL, ESOP finance and risk management.

He comes from Western Alliance Bank, where he was SVP Relationship Manager (2024–January 2026), after four years as Director, Relationship Manager at Wells Fargo in Scottsdale (2020–2024) and two as VP at U.S. Bank (2018–2020). His first decade was at Bank of America: AVP Senior Financial Analyst in Charlotte administering allowance-for-loan-loss reserves for the $400B+ consumer and small business portfolios (2007–2010), then AVP Commercial Associate supporting middle-market teams across six Western states and VP Relationship Manager in Phoenix (2010–2017). He began in fixed-income trading support and portfolio analysis at Evergreen Investments (2001–2006).

Five Phoenix middle-market platforms in twelve years gives him an unusually broad view of the market. He holds FINRA Series 7 and 63 registrations, served three years on the board of Arizona Business Leadership, and holds a BA in Economics and English from UNC Chapel Hill.

Skills & endorsements

Middle Market Lending · Treasury Management · Equipment Finance · Asset Based Lending · ESOP Finance · Risk Management

Community

- Board of Directors, Arizona Business Leadership (2017–2020)

Rachel Senuta, CTP

SVP, Senior Relationship Manager – Healthcare, Education & Not-For-Profit

Bank of America

Education
Accounting/Finance, University of Pittsburgh (magna cum laude)

Languages
Spanish

Credentials
Certified Treasury Professional (CTP), 2016

linkedin.com/in/rachelsenuta

Banker 20 of 37

Previously
JPMorgan Chase
Executive Director – Healthcare, Higher Education & Nonprofit Banking

→

Joined Jul 2026
Bank of America
SVP, Senior Relationship Manager – Healthcare, Education & Not-For-Profit

Pittsburgh, PA	SVP	1,430	Jul 2026
Market	Title band	LinkedIn connections	Start date

Rachel took the SVP, Senior Relationship Manager role in Bank of America's Healthcare, Education and Not-For-Profit banking group in Pittsburgh in July 2026, one of only two moves into Bank of America in a cohort where eight bankers left it.

She leaves JPMorgan Chase after five years as Executive Director in Healthcare, Higher Education and Nonprofit Banking for Pennsylvania (2021–2026). Her background is treasury first: five years as a Treasury Management Consultant in Payables at Wells Fargo in Philadelphia, rising from AVP to SVP (2016–2021), and five years in PNC's treasury consulting group in Philadelphia and Pittsburgh, from intern to officer (2011–2016).

She is a Certified Treasury Professional (2016) and her endorsements reflect that base: working capital, liquidity and cash management, accounts payable and receivable, alongside Banking (12) and Sales (8). She lists Spanish as a skill and graduated magna cum laude from the University of Pittsburgh in Accounting with Finance, International Business and Spanish concentrations, including an exchange year at Universitat Pompeu Fabra in Barcelona.

Skills & endorsements

Treasury Management · Working Capital Management · Liquidity Management · Cash Management · Banking · Sales · Financial Analysis · Spanish

Recognition

- Magna cum laude, University of Pittsburgh

Julio Cuadrado-Ortega

Senior Vice President, Commercial Relationship Manager

Fifth Third Bank

Education
BBA Finance & Accounting, Universidad de Puerto Rico

Languages
English (full professional), Spanish (full professional)

linkedin.com/in/juliocuadrado

Banker 21 of 37

Previously
Bank of America
Senior Relationship Manager, Houston

→

Joined Jun 2026
Fifth Third Bank
Senior Vice President, Commercial Relationship Manager

Houston, TX	SVP	1,176	Jun 2026
Market	Title band	LinkedIn connections	Start date

Julio joined Fifth Third Bank in Houston in June 2026 as Senior Vice President and Commercial Relationship Manager, part of Fifth Third's Texas expansion.

He moves from Bank of America, where he was Senior Relationship Manager in Houston (2023–2026). Before that he spent eight years at Regions Bank as VP Senior Commercial Credit Portfolio Manager and then VP Commercial Relationship Manager (2015–2023), and eight at BBVA Compass in Houston moving through assistant RM, loan review team leader, commercial risk and portfolio manager and Credit Products Officer for syndications and large middle market (2007–2015). His career began in Puerto Rico as an accountant at Norwest Financial and seven years as Senior Auditor and Senior Credit Analyst at Westernbank Business Credit, a Wachovia unit (2000–2007).

He was named Hispanic Executive of the Year by the Houston Latino Entrepreneur Chamber of Commerce in 2023 and is fully bilingual in English and Spanish. Endorsements lead with Banking (22), Credit (17), Commercial Banking (16) and Loans (14). He holds a BBA in Finance and Accounting from the Universidad de Puerto Rico.

Skills & endorsements

Banking · Credit · Commercial Banking · Loans · Financial Analysis · Underwriting · Risk Management · Portfolio Management

Recognition

- Hispanic Executive of the Year, Houston Latino Entrepreneur Chamber of Commerce (2023)

AK

Amy Kilmon

SVP, Commercial Banking Executive

Columbia Bank

Education
BA Accounting & BA Psychology, Randolph-Macon College

linkedin.com/in/amy-kilmon-3672a834

Banker 22 of 37

Previously
Bank of America Merrill Lynch →
VP, Global Commercial Banking

Joined Sep 2026
Columbia Bank
SVP, Commercial Banking Executive

Los Angeles, CA	SVP	1,097	Sep 2026
Market	Title band	LinkedIn connections	Start date

Amy is the most recent mover in this cohort, joining Columbia Bank in Los Angeles in August 2026 as SVP, Middle Market Senior Relationship Manager and being retitled SVP, Commercial Banking Executive in September.

She leaves Bank of America Merrill Lynch after eight and a half years as Vice President in Global Commercial Banking in Los Angeles (2018–2026), preceded by Bank of the West (VP Senior Relationship Manager, 2015–2018). Her first 17 years were at First Union / Wachovia / Wells Fargo, starting as a Licensed Financial Specialist in Richmond (1998) and then as VP Senior Relationship Manager in Commercial Banking in Richmond, Miami and Beverly Hills (2003–2015).

She brings expertise in M&A financing, syndications, asset-based lending and commercial real estate. Endorsements lead with Commercial Lending (27), Small Business Lending (22), Credit (18) and Banking (15); her profile's top skills are Finance, Negotiation and Portfolio Management. She holds bachelor's degrees in Accounting and Psychology from Randolph-Macon College and studied at Lancaster University in the UK.

Skills & endorsements

Finance · Negotiation · Portfolio Management · Commercial Lending · Small Business Lending · Credit · New Business Development · Strategic Planning

Yvette Lee

Executive Director, Senior Lead Relationship Manager

Wells Fargo

Education
BS Finance (Spanish minor), DePaul University

linkedin.com/in/yvette-lee-6643871

Banker 23 of 37

Previously
JPMorgan Chase
Vice President, Commercial Banking – Chicago

→

Joined Aug 2026
Wells Fargo
Executive Director, Senior Lead Relationship Manager

Chicago, IL	Executive Director	925	Aug 2026
Market	Title band	LinkedIn connections	Start date

Yvette joined Wells Fargo Commercial Banking in Chicago in August 2026 as Executive Director and Senior Lead Relationship Manager, leading middle-market relationships across Chicagoland with a focus on treasury management, credit and capital solutions.

She spent the previous eleven years at JPMorgan Chase: NMTC Portfolio Manager on the New Markets Tax Credit platform (2015–2018), Associate Commercial Banker (2018–2021) and Vice President in Commercial Banking (2021–2026). Before Chase she was a Senior Credit Underwriter at BankFinancial in Lincolnwood (2013–2015), so her path runs underwriting to portfolio management to coverage.

The move from VP at JPMorgan Chase to Executive Director at Wells Fargo is a two-band title step, one of several such uplifts in this cohort. A lifelong Chicago-area banker, Yvette earned a BS in Finance with a minor in Spanish from DePaul University.

Skills & endorsements

Treasury Management · Credit · Capital Solutions · Relationship Management · New Markets Tax Credit

MS

Marcus Smith, MBA

SVP, Senior Commercial Relationship Manager

First Horizon Bank

Education
BS Finance, UNC Charlotte; MBA, Pfeiffer University

linkedin.com/in/marcussmithmba

Banker 24 of 37

Previously
Bank of America
SVP, Commercial Banking Senior Relationship Manager

→

Joined Jul 2026
First Horizon Bank
SVP, Senior Commercial Relationship Manager

Charlotte, NC	SVP	2,689	Jul 2026
Market	Title band	LinkedIn connections	Start date

Marcus joined First Horizon Bank in Charlotte in July 2026 as SVP and Senior Commercial Relationship Manager, serving commercial, middle-market and non-profit organizations with $20MM to $500MM+ in revenue.

He leaves Bank of America after five years as SVP and Senior Relationship Manager in Global Commercial Banking in Charlotte, where he was responsible for more than $5MM in annual portfolio revenue (2021–2026). Earlier he was a Commercial Banking RM at SunTrust / Truist (2018–2021), SVP Commercial Lending at Bank of the Ozarks (2017–2018) and spent nine years at NewBridge Bank as VP Regional Commercial Banker and Special Assets, where he cut an $85MM problem-loan portfolio by $20MM and returned $4.5MM in targeted payouts in 2016 with zero loss. Before that he opened a de novo loan production office for Woodlands Bank and was a market leader at Coastal Federal Bank; his first nine years were at Wachovia in Charlotte (1996–2005).

With 30 years in commercial banking across nine institutions, his stated industry experience spans emerging growth, healthcare, manufacturing, not-for-profit, professional services and wholesale trade. He holds an MBA from Pfeiffer University and a BS in Finance from UNC Charlotte, where he is Vice Chair of the Belk College Alumni Council; he is also a board member and Treasurer of University City Partners.

Skills & endorsements

Consultative Selling · Business Development · Sales Management · Business Analysis · Strategic Financial Management · Small Business Lending · Underwriting · Loan Origination

Community

- Vice Chair, UNC Charlotte Belk College Alumni Council (2018–present)
- Board Member & Treasurer, University City Partners (2025–present)

Casey Cooper

Senior Vice President, Senior Relationship Manager

Bank of America

Education
BS International Economics (Finance), San Diego State

Languages
Spanish

Credentials
FINRA Series 63; FINRA Series 79

linkedin.com/in/casey-cooper-29965015

Banker 25 of 37

Previously
Wells Fargo
Executive Director, Principal Relationship Manager – Orange County

→

Joined Aug 2026
Bank of America
Senior Vice President, Senior Relationship Manager

Orange County, CA	SVP	548	Aug 2026
Market	Title band	LinkedIn connections	Start date

Casey joined Bank of America's Newport Beach commercial banking office in August 2026 as Senior Vice President and Senior Relationship Manager, covering Orange County middle-market companies. He is one of two bankers moving into Bank of America in this cohort, in the same month Bank of America lost three to other banks.

He leaves Wells Fargo after nine years as Executive Director and Principal Relationship Manager in Orange County (2017–2026), a role that makes him one of four Wells Fargo departures here. Before that he was VP Relationship Manager at Comerica in Costa Mesa (2015–2017) and spent eight earlier years at Wells Fargo in the Inland Empire as Business Development Representative, Credit Officer and Commercial Loan Officer (2007–2015). He came to banking from automotive retail, where he was a dealership finance and sales manager (2002–2007).

He holds FINRA Series 63 and Series 79 registrations, the latter an investment-banking representative license rare among commercial RMs, and lists Spanish as a language. He volunteers with the San Bernardino Food Bank and holds a BS in International Economics with a finance emphasis from San Diego State University.

Skills & endorsements

Negotiation · Sales · Analytical Skills · Business Development · Management · Credit · Portfolio Management · Relationship Management

Community

- Volunteer, San Bernardino Food Bank
- Team Lead, Get Smart About Credit series

Richard Toft

Executive Director, Principal Commercial Banking Relationship Manager

Wells Fargo

Education
BA Economics (Math minor), Vassar College

linkedin.com/in/richard-toft-8238931a

Banker 26 of 37

Previously
Northern Trust
SVP, Wealth Strategist

→

Joined Jul 2026
Wells Fargo
Executive Director, Principal Commercial Banking Relationship Manager

San Francisco Bay Area, CA	Executive Director	1,143	Jul 2026
Market	Title band	LinkedIn connections	Start date

Richard stepped into the Executive Director, Principal Commercial Banking Relationship Manager role at Wells Fargo in the San Francisco Bay Area in July 2026, returning to the bank where he spent the first decade of his career.

He comes back from Northern Trust, where he was Vice President, Banking Advisor (2021–2023) and then SVP Wealth Strategist (2023–2026) in Northern California private banking, lending to affluent families and closely held companies on capital-call lines, aircraft, yachts and commercial real estate. Before that he spent ten years at Wells Fargo: Commercial Strategies Analyst and Financial Analyst Program in Chicago, New York and Atlanta (2010–2014), the Credit Management Training Program with a rotation through London, Dublin and Frankfurt, AVP Relationship Manager in the Global Banking Technology Group in Palo Alto managing a $200MM portfolio (2014–2017), and VP Senior Relationship Manager in the San Francisco Commercial Banking Group managing $250MM across CRE, private equity, specialty finance and technology (2017–2021).

An Eagle Scout, he sits on the Executive Leadership Council of Raphael House of San Francisco and holds a BA in Economics with a minor in Mathematics from Vassar College, where he played varsity soccer and rugby.

Skills & endorsements

Relationship Management · Wealth Management Services · Financial Modeling · Credit Analysis · Corporate Finance · Portfolio Management

Recognition

- Eagle Scout

Community

- Executive Leadership Council, Raphael House of San Francisco (2022–present)

MK

Manar Khoury

SVP, Commercial Banking Senior Relationship Manager

Fifth Third Bank

Education
BS Accounting & BS Finance, Portland State

Credentials
FINRA Series 7; FINRA Series 63

linkedin.com/in/manar-khoury

Banker 27 of 37

Previously
Bank of America Merrill Lynch →
Senior Relationship Manager, VP – Inland Empire

Joined Jun 2026
Fifth Third Bank
SVP, Commercial Banking Senior Relationship Manager

Inland Empire, CA	SVP	857	Jun 2026
Market	Title band	LinkedIn connections	Start date

Manar joined Fifth Third Bank in June 2026 as SVP and Commercial Banking Senior Relationship Manager, based in Ontario, California, covering the Inland Empire.

He leaves Bank of America Merrill Lynch after nine years in commercial banking there, most recently as Senior Relationship Manager, VP for the Inland Empire (2025–2026), after Technology-industry relationship manager roles in Los Angeles (2019–2024) and two years as a Treasury Solutions Analyst (2017–2019). Before commercial banking he was an Auditor with the Oregon Department of Revenue, testifying as an expert witness in Oregon Tax Court (2014–2016), and spent nine years as a Senior Teller at Bank of America in Portland, where he won Top Performing Professional Teller Excellence awards three years running (2005–2014).

He holds FINRA Series 7 and 63 registrations, was selected for Leadership Riverside's 2024–25 class, and sits on the board of Inland SoCal United Way. He holds dual BS degrees in Accounting and Finance from Portland State University, where he was VP of Membership for Beta Alpha Psi.

Skills & endorsements

Accounting · Finance · Auditing · Tax · Risk Management · Cash Management · Commercial Banking · Financial Analysis

Recognition

- Leadership Riverside, Class of 2024–25
- Top Performing Professional Teller Excellence, Bank of America (2011, 2012, 2013)

Madison Murphy

Executive Director, Senior Relationship Manager

Wells Fargo

Education
BA Economics & Political Science, UCLA; MBA, UC Irvine Merage

linkedin.com/in/madison-murphy-

Banker 28 of 37

Previously
Citi
SVP, Relationship Manager – Multinational Subsidiaries

→

Joined Jul 2026
Wells Fargo
Executive Director, Senior Relationship Manager

Orange County, CA	Executive Director	1,579	Jul 2026
Market	Title band	LinkedIn connections	Start date

Madison joined Wells Fargo Commercial Banking in Irvine in July 2026 as Executive Director and Senior Relationship Manager, advising Orange County middle-market and multinational companies with $100–500MM in revenue on credit, treasury and international banking.

She spent her entire prior career at Citi, thirteen years in all: Analyst and AVP Senior Credit Analyst in Orange County (2013–2015), VP Relationship Manager (2016–2021), VP Business Manager and then SVP Business Execution supporting the Global Head of Commercial Banking on executive initiatives and business transformation (2021–2025), and finally SVP Relationship Manager in Irvine advising multinational corporations and their U.S. subsidiaries (2025–2026).

At Citi she was recognized with the inaugural Citi of Stars award for Talent Development & Diversity Leadership (2020, awarded to under 2% of commercial banking staff globally), a Global Citizenship Award (2021), a Milestone Award (2021) and a Corporate Citizenship Award (2023). She holds an MBA from UC Irvine's Merage School (Dean's Scholar) and a BA in Economics and Political Science from UCLA, and mentors students through the Fellowship of Christian Athletes.

Skills & endorsements

Commercial Banking · Treasury Management · Commercial Lending · Commercial Real Estate · Financial Modeling · Program Management · Coaching & Mentoring

Recognition

- Citi of Stars – Talent Development & Diversity Leadership (2020)
- Global Citizenship Award, Citi (2021)
- Corporate Citizenship Award, Citi (2023)

Community

- Student Mentor, Fellowship of Christian Athletes

MF

Mark Flock

Executive Director, Senior Relationship Manager – Emerging Middle Market

Wells Fargo

Education
BS Finance & MBA, University of Dayton

linkedin.com/in/mark-flock-925b655

Banker 29 of 37

Previously
Polaris Healthcare Partners →
Partnership & Equity Solutions Executive

Joined Jun 2026
Wells Fargo
Executive Director, Senior Relationship Manager – Emerging Middle Market

Columbus, OH	Executive Director	2,922	Jun 2026
Market	Title band	LinkedIn connections	Start date

Mark joined Wells Fargo in Columbus, Ohio in June 2026 as Executive Director and Senior Relationship Manager in Emerging Middle Market Commercial Banking, one of two bankers in this cohort returning to banking from a non-bank role.

He spent the prior four years at Polaris Healthcare Partners, a consulting and growth-capital firm for healthcare group practices, as Partnership & Equity Solutions Executive (2022–2026). Before that he was VP Healthcare Business Banker at PNC in Columbus, financing physician, dental and veterinary practices (2019–2022), ran inside sales at Cranel (2017–2019), managed healthcare practice-finance sales teams at East West Bank (2015–2016) and Bank of America, where he led a 32-person inside sales team (2011–2015). He started in recruiting at Aerotek.

His profile is unusual in the cohort for its depth in healthcare practice finance and sales leadership, and his endorsements skew toward sales, marketing, leadership, training and business development. He has 2,900+ connections, the fourth-largest network in the group, served ten years on the board of the Ohio Business Week Foundation and joined the board of Breakthrough T1D in 2026. He holds a BS in Finance and an MBA from the University of Dayton.

Skills & endorsements

Sales · Leadership · Business Development · Team Leadership · Process Improvement · Strategic Planning · Account Management · Banking

Community

- Board of Directors, Ohio Business Week Foundation (2015–2026)
- Volunteer, JDRF (2007–2017)

TE

Thomas Eddy

Executive Director, Senior Commercial Banking Relationship Manager

Wells Fargo

Education
BS Marketing & BS Finance, Portland State

Credentials
FINRA Series 6 and 63; NMLS; OR Life and Health

linkedin.com/in/thomas-eddy-4868b914

Banker 30 of 37

Previously
Spartan Investment Group
Director of Capital

→

Joined Jun 2026
Wells Fargo
Executive Director, Senior Commercial Banking Relationship Manager

Seattle, WA	Executive Director	861	Jun 2026
Market	Title band	LinkedIn connections	Start date

Thomas joined Wells Fargo in Seattle in June 2026 as Executive Director and Senior Commercial Banking Relationship Manager, the cohort's only Pacific Northwest mover outside Portland and one of two returning to banking from a non-bank role.

He spent nearly five years as Director of Capital at Spartan Investment Group, a Seattle real estate sponsor (2021–2026), after four years as VP Business Relationship Manager at JPMorgan Chase in Seattle (2017–2021). His earlier career was at U.S. Bank in Portland: eight years as Mortgage Loan Officer, Licensed Personal Banker, Assistant Manager and Teller Coordinator (2008–2016) and a short stint in Private Wealth Management (2017), which is where most of his endorsements originate.

He holds NMLS, Oregon life and health, and FINRA Series 6 and 63 licenses dating from 2010–2013. Endorsements lead with Banking (17), Credit (10), Loans (8) and Public Speaking (6). He holds dual BS degrees in Marketing and Finance from Portland State University.

Skills & endorsements

Banking · Credit · Loans · Relationship Management · Public Speaking · Customer Experience · Investments

TG

Tim Green

SVP, Commercial Relationship Manager & Market President

Fifth Third Bank

Education
Accounting & Finance, University of North Alabama; CBA, CTP

Credentials
Certified Treasury Professional (2013); Certified Bank Auditor (1993)

linkedin.com/in/tim-green-85b7a312

Banker 31 of 37

Previously
Huntington National Bank
Regional Banking Relationship Manager Sr., Huntsville

→

Joined Aug 2026
Fifth Third Bank
SVP, Commercial Relationship Manager & Market President

North Alabama, AL	SVP	1,705	Aug 2026
Market	Title band	LinkedIn connections	Start date

Tim joined Fifth Third Bank in August 2026 as SVP, Commercial Relationship Manager and Market President for North Alabama, tasked with building the bank's commercial team in the Huntsville market.

He leaves Huntington National Bank after five years as Regional Banking Relationship Manager Sr. in Huntsville, where he built a commercial portfolio of manufacturing, machining, medical, government-contractor and institutional clients with $2–500MM in revenue (2021–2026). Before that he was SVP of Commercial Banking at Renasant Bank (2017–2021), Market President of Regions' $260MM Athens/Limestone County bank (2014–2017) and VP Business Banking at Regions (2012–2014). His first two decades were at BBVA Compass in Huntsville, moving from credit manager through banking center manager to VP Commercial Banking (1998–2012), Regions in collections, loan operations and acquisition integration (1994–1998) and AmSouth as an internal auditor (1990–1994).

He is a Certified Treasury Professional (2013) and Certified Bank Auditor (1993). Endorsements lead with Banking (77), Credit (61), Loans (49) and Commercial Banking (41). He holds a degree in Accounting and Finance from the University of North Alabama and has led Scouting units in Athens, Alabama for two decades as Cub Master and Scoutmaster.

Skills & endorsements

Banking · Credit · Loans · Commercial Banking · Portfolio Management · Consumer Lending · Business Development · Mergers & Acquisitions

Community

- Scoutmaster, Boy Scout Troop 240 (2011–present)
- Charter Representative, Cub Scout Pack 24 (2006–present)

Josh Picchetti

Executive Director, Senior Lead Commercial Banking Relationship Manager

Wells Fargo

Education
Capstone Institute (NMLS/SAFE Act)

Languages
English (professional), Spanish (professional)

Credentials
NMLS Licensed; School for Managers Certification, Georgia Industrial Loan Association

linkedin.com/in/joshmp75123

Banker 32 of 37

Previously
Bank of America
VP, Business Banking Senior Relationship Manager – Atlanta

→

Joined Jul 2026
Wells Fargo
Executive Director, Senior Lead Commercial Banking Relationship Manager

Atlanta, GA	Executive Director	667	Jul 2026
Market	Title band	LinkedIn connections	Start date

Josh joined Wells Fargo in Atlanta in July 2026 as Executive Director and Senior Lead Commercial Banking Relationship Manager, working hybrid.

He spent the prior eleven years at Bank of America in Atlanta: Relationship Manager (2015–2016), Financial Center Manager (2016–2020), where he led the turnaround of two bottom-ranked centers and finished #2 in the market for revenue and top 5% of 4,200 centers for client experience, VP Small Business Banker (2020–2022), VP Business Banking Relationship Manager (2022–2025) and VP Business Banking Senior Relationship Manager (2025–2026). Before banking he was General Manager for TMX Finance in Gainesville, Georgia (2010–2015), Director of Residential Services at Assent Capital and VP of Sales at AAA Mortgage.

The move from a VP business-banking seat to an Executive Director commercial-banking seat is the largest single title uplift in the cohort. He is NMLS licensed, holds a School for Managers certification from the Georgia Industrial Loan Association, and is bilingual in English and Spanish. Endorsements lead with Management (20), Sales (17), Customer Service (15) and Account Management (12).

Skills & endorsements

Management · Sales · Customer Service · Account Management · Team Building · Training · Coaching · New Business Development

Allison Ho

Managing Director, Senior Relationship Manager

BMO

Education
BS Finance, Cal State Los Angeles

linkedin.com/in/allison-ho-1103511

Banker 33 of 37

Previously
Wells Fargo
Senior Relationship Manager, Commercial Banking – Pasadena

→

Joined Sep 2026
BMO
Managing Director, Senior Relationship Manager

Los Angeles, CA	Managing Director	625	Sep 2026
Market	Title band	LinkedIn connections	Start date

Allison joined BMO in Los Angeles in September 2026 as Managing Director and Senior Relationship Manager, one of the last moves in the cohort.

She leaves Wells Fargo after twelve years, most recently as Senior Relationship Manager in Commercial Banking in Pasadena (2017–2026) and before that VP Senior Portfolio Manager (2014–2017). Earlier she spent six years at U.S. Bank in Los Angeles as VP Portfolio Manager and Portfolio Manager Team Leader (2008–2014), nearly eight at BNP Paribas managing a $1.5B corporate banking portfolio of fifteen large clients including gaming companies (2000–2008), and began at Bank of America as a credit analyst and commercial underwriter (1997–2000), where she received her formal credit training.

With 29 years lending to commercial and corporate clients, she brings deep experience structuring C&I, asset-based, owner-occupied and investor real estate, and tax-exempt bond transactions. Endorsements are credit-heavy: Credit Analysis (12), Financial Modeling (9), Financial Analysis (9), Commercial Banking (8). She holds a BS in Finance from California State University, Los Angeles.

Skills & endorsements

Credit Analysis · Financial Modeling · Financial Analysis · Commercial Banking · Risk Management · Asset Based Lending · Commercial Real Estate · Cash Flow Forecasting

KK

Kevin Kwon

Director, Commercial Banking Relationship Manager

BMO Commercial Bank

Education
International Studies, UC Irvine

linkedin.com/in/kevin-kwon-368a154

Banker 34 of 37

Previously
J.P. Morgan
Vice President, Commercial Banker – Los Angeles

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Joined Aug 2026
BMO Commercial Bank
Director, Commercial Banking Relationship Manager

Los Angeles, CA	Director	890	Aug 2026
Market	Title band	LinkedIn connections	Start date

Kevin joined BMO Commercial Bank in Los Angeles in August 2026 as Director and Commercial Banking Relationship Manager.

He arrives from J.P. Morgan, where he was Vice President, Commercial Banker in Los Angeles (2025–2026). His recent path runs through most of the large LA commercial platforms: VP Commercial Banking Business Development Officer at Wells Fargo (2022–2025), Senior Relationship Manager in Business Banking at Bank of America Merrill Lynch (2021–2022) and Senior Business Relationship Manager at City National Bank (2019–2021). Four employers in seven years is the fastest cadence in the cohort.

Endorsements point to a retail-to-commercial origin: Banking, Retail Banking, Mortgage Lending, Consumer Lending and Portfolio Management, with sales management, partnership and business development also listed. He studied International Studies at UC Irvine.

Skills & endorsements

Banking · Retail Banking · Mortgage Lending · Portfolio Management · Business Development · Sales Management · Credit

Tripp Cone

Director, Relationship Manager – Healthcare

Citizens

Education
BS Accounting, The Citadel; MBA, UVA Darden

linkedin.com/in/lloydcone

Banker 35 of 37

Previously
Wells Fargo
Director, Relationship Manager – Charlotte

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Joined Jun 2026
Citizens
Director, Relationship Manager – Healthcare

Charlotte, NC	Director	670	Jun 2026
Market	Title band	LinkedIn connections	Start date

Tripp joined Citizens in Charlotte in June 2026 as Director and Relationship Manager in Healthcare banking, one of three healthcare-specialist movers in the cohort.

He leaves Wells Fargo after twelve years in Charlotte, joining as an Associate out of business school (2014) and progressing to VP Relationship Manager (2017–2021), Relationship Manager (2021–2022) and Director, Relationship Manager (2022–April 2026). Before banking he was an Associate at Booz Allen Hamilton in Washington (2010–2012), a summer associate in Barclays' investment bank (2013), and served in the U.S. Army as a Battalion Intelligence Officer in Baghdad and a Captain and Platoon Leader at Schofield Barracks, Hawaii (2007–2010).

He holds an MBA in Finance from the University of Virginia's Darden School of Business (2014), where he was active in the Darden Capital Management and Finance clubs, and a BS in Accounting and Business Management from The Citadel (2006), where he was Academic Officer over 100+ cadets, an elected board member and a Summerall Guard.

Skills & endorsements

Healthcare Banking | Relationship Management | Finance

Recognition

- Summerall Guards, The Citadel

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Susan Rich

Senior Vice President, Relationship Manager – Commercial Banking

KeyBank

Education
BA Accounting, Albright College

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Banker 36 of 37

Previously
Fifth Third Bank
Director, Portfolio Management

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Joined Jun 2026
KeyBank
Senior Vice President, Relationship Manager – Commercial Banking

Pittsburgh, PA	SVP	715	Jun 2026
Market	Title band	LinkedIn connections	Start date

Susan joined KeyBank in Pittsburgh in June 2026 as Senior Vice President and Relationship Manager in Commercial Banking, moving from a portfolio-management seat into coverage.

She leaves Fifth Third after three years as Director of Portfolio Management (2023–2026). Before that she spent eight years as SVP in Global Commercial Banking at Bank of America Merrill Lynch (2015–2023), was VP Commercial Underwriting Manager at First Niagara in Pittsburgh (2014–2015) and VP Senior Commercial Portfolio Manager in asset-based lending at Huntington (2011–2013). Her early career was in credit and audit at PNC, where as Credit Officer she was one of two approvers bank-wide for asset-based aviation transactions (2007–2011), preceded by field examination work at PNC Business Credit and Freed Maxick CPAs and four years in Pennsylvania state finance roles (1999–2005).

That path produces one of the most structured-credit-oriented profiles in the group: Commercial Lending (14), Portfolio Management (14), Commercial Banking (12), Credit Analysis (11) and Asset Based Lending (9), with C&I, leveraged lending, public companies, collateral management and underwriting also listed. She holds a bachelor's degree in Accounting from Albright College.

Skills & endorsements

Commercial Lending · Portfolio Management · Commercial Banking · Credit Analysis · Asset Based Lending · Leveraged Lending · C&I Lending · Underwriting

Miguel Alban

SVP, Senior Relationship Manager – Middle Market Banking Group

KeyBank

Education
JD Universidad de Piura; LLM Temple Law; ABA Stonier / Wharton

Languages
Spanish

Credentials
ABA Stonier Graduate School of Banking (2020); Wharton Executive Education certificate (2024); NMLS; Real Estate; Life/Health and P&C Insurance licenses

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Banker 37 of 37

Previously
Customers Bank
SVP, Middle Market Business Development Executive

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Joined Jun 2026
KeyBank
SVP, Senior Relationship Manager – Middle Market Banking Group

Greater Philadelphia, PA	SVP	4,818	Jun 2026
Market	Title band	LinkedIn connections	Start date

Miguel joined KeyBank in June 2026 as SVP and Senior Relationship Manager in the Middle Market Banking Group, covering Greater Philadelphia and Southern New Jersey across C&I and commercial real estate lending, treasury and capital markets, and partnering with business owners, executives and financial sponsors.

He leaves Customers Bank after six years, most recently as SVP Middle Market Business Development Executive for the Eastern Region from Massachusetts to Florida, leading a team of C&I, commercial and small-business bankers responsible for a $200MM loan portfolio and $150MM in deposits, and as National Market Executive for Multicultural Banking, a division he built from scratch to 100% portfolio growth in its first year (2020–2026). Before that he ran multicultural banking at WSFS Bank (2018–2020), founded The Hispanic Approach marketing firm (2013–2018), originated deal flow for AFLG Private Equity (2014–2016), and built Susquehanna / Truist's Hispanic business banking division from inception (2008–2014).

He has served as Honorary Consul of Peru in Philadelphia since 2019, was named an ABA Emerging Leader (2024) and a Philadelphia Business Journal 40 Under 40 (2020), and holds a JD from Universidad de Piura, an LLM from Temple Law, an ABA Stonier Graduate School of Banking diploma (Wharton) and NMLS, real estate and insurance licenses. He is bilingual in English and Spanish and has the second-largest network in the cohort at 4,800+ connections.

Skills & endorsements

International Business · Sales Management · Banking · Mergers · Wealth Management · Contract Negotiation · Corporate Law · Bilingual

Recognition

- ABA Emerging Leader Award (2024)
- 40 Under 40, Philadelphia Business Journal (2020)
- Honorary Consul of Peru (2018)

Community

- Chairman of the Board, Congreso de Latinos Unidos (2018–present)
- Board of Trustees, Malvern Preparatory School (2019–present)