customers bank

Banking Matters

Financial Institutions Group

About the Financial Institutions Group

Customers Bank Financial Institutions Group (FIG) is comprised of six team members with extensive experience in providing banking services to Financial Institutions including Securities Broker Dealers, Trust Companies, RIAs, Community Banks, Insurance Companies, and FinTechs. Due to the highly specialized and regulated nature of the industry, these businesses benefit from bankers with an intimate understanding of their operations, limitations, and compliance requirements.

What sets the team apart?

Expertise. Several members of the team have been in our clients' shoes. With first-hand experience in fintech, securities, and wealth management, the FIG team knows its clients' business and how Customers Bank can help accelerate their success.

From your perspective, what sets Customers apart?

Customers Bank's single point-of-contact service delivery model coupled with its flat organizational structure enables us to serve customers with agility, while keeping them at the forefront of decision-making. Here, teams are empowered to bring innovative, compelling deposit and lending solutions directly to the clients with speed and decisiveness.

Meet the FIG Team

Jake Danielski
Managing Director

Bill Cassidy
Senior Vice President

Zoe Mountroukas
Senior Vice President

Tyler Scallorn
Senior Vice President

Brandon Troster
Senior Vice President

Maria Hartigan
Associate Client Manager

Jake Danielski serves as Managing Director of Customers Bank's Financial Institutions Group. With over 19 years of banking experience, Jake works with a variety of financial instructions—including broker dealers, RIAs, fintech firms, and trust companies—to create new opportunities, streamline processes, and enhance client experiences in ways others might not consider. His expertise lies in bridging internal and external banking environments and understanding complex financial systems while delivering practical, tailored solutions for clients.

Jake's banking career began as a teller in a New York City bank branch where he worked his way through branch management to oversee multiple locations before transitioning to a Business Banking Relationship Manager. In 2013, he joined Customers Bank as a Client Manager when it was a $2.1 billion institution, becoming one of its first four team members in New York City. Jake's entrepreneurial vision was pivotal in introducing a small, high-touch banking team model to the Bank where decisions were made locally, and services were tailored to fit clients' unique needs. With help from his leadership, the New York division grew into a thriving operation employing hundreds and managing billions in loans and deposits while maintaining its entrepreneurial spirit. In 2021, Jake took on the role of Texas Market Executive, successfully launching Customers Bank's first Texas office. Later that year, he founded the Financial Institutions Group (FIG).

Clients working with Jake can expect a true relationship banker and advocate who is transparent, realistic, and committed to delivering on promises. He prioritizes trust, follow-through, and long-term partnerships over short-term wins. As an innovator, he consistently brings fresh ideas that challenge the status quo and drives meaningful improvements both within Customers Bank and for his clients. Jake describes his professional superpower as being a calculated risk-taker who creates enthusiasm and momentum, inspiring both team members and clients to rally behind a vision. His ability to engage, motivate, and execute has been a driving force in building successful teams and banking solutions.

Jake holds a BS in Finance from City University of New York - Baruch College, Zicklin School of Business, and is currently enrolled in the Securities Industry Institute at the Wharton School. He previously held the designation of Certified Anti-Money Laundering Specialist (CAMS).

Beyond his professional accomplishments, Jake draws his greatest motivation from his 8-year-old son, Grayson, who survived a brain tumor. After an extensive surgery and subsequent 30-day coma, Grayson had to relearn how to breathe, talk, eat, walk, and move—a journey of relentless perseverance that continues today. Witnessing his son's strength and resilience serves as a constant reminder to Jake that with the right mindset, any challenge can be overcome.

Bill Cassidy brings over three decades of comprehensive financial services experience to his role as Senior Vice President in Customers Bank's Financial Institutions Group (FIG). His diverse career spans both banking and wealth management, giving him a unique perspective and valuable insight in his role leading Advisor Banking for FIG and working predominately with Registered Investment Advisors and their clients.

Bill's banking career includes four years as Vice President in Cash Management at Bank of America, six years as Executive Vice President at The Bancorp Bank, and three years as Managing Director at Advisor Credit Exchange. Prior to banking, Bill spent more than 30 years in wealth management, working with broker dealers and asset management firms, including over 22 years with SEI in the United States and Asia.

Joining Customers in 2024, Bill was drawn to the Bank for it's forward-thinking profile and opportunity to serve as a strategic banking and lending partner for wealth management firms. Clients working with Bill benefit from his deep understanding of their business models and the markets they operate in. His firsthand experience in wealth management allows him to comprehend the challenges and market dynamics facing professionals in the space in ways few bankers can.

A Penn State University graduate, Bill previously held several financial industry credentials including FINRA Series 6, 63, 7, and 24 licenses, as well as Principal Designations for Advising (Type 4) and Portfolio Management (Type 9) from the Hong Kong Securities & Futures Commission.

Bill is actively involved with several community organizations including Wreaths Across America, Tunnels to Towers, and the Union League of Philadelphia. He resides in Wayne, Pennsylvania, with his wife, Vicki, and their dog, Boomer. As the proud parent of three adult children living in Boston and Philadelphia, Bill considers family both a hobby and a vocation. His personal interests include travel (having visited all 50 states with just two continents left to explore), fitness, cooking, sports, photography, and writing.

Zoe Mountroukas, Senior Vice President at Customers Bank, specializes in delivering high-tech, high-touch service and a full suite of deposit and lending solutions to help financial institutions grow and operate more efficiently. As a member of the Bank's Financial Institutions Group, Zoe primarily supports Trust Companies with crafting innovative deposit growth opportunities and maximizing cash management strategies to support long-term success.

With nearly a decade at Customers Bank, Zoe has achieved remarkable success through her tenacity, open-minded approach, and entrepreneurial mindset. Early in her career, she managed a banking team in the New York metro area, the only women-led team at that time. Zoe has played a pivotal role in driving significant deposit growth and introducing key solutions to the bank that have since been incorporated into FIG's product offerings. In 2020, she was honored with the Customers Bank Chairman's Award in recognition of her outstanding contributions.

With over 30 years dedicated to commercial banking, Zoe takes a straightforward approach to supporting her clients' goals. She carefully listens to their needs, develops creative strategies to maximize returns, and delivers insights to drive growth. Clients can expect a highly personalized banking experience when working with Zoe. As their single point of contact, she knows their business, challenges, and opportunities intimately and provides seamless, efficient service tailored to their unique financial needs.

Prior to joining Customers Bank in 2015, Zoe held a variety of positions at Citi and Chase. She holds a BS in Business Administration from Fordham University's Gabelli School of Business. This comprehensive financial education and background enables Zoe to tackle complex deals with a refreshingly smooth and personable approach.

A leader in the Irvington, NY community, Zoe serves on the board of the Port Chester Rye Brook Chamber of Commerce and Read Alliance, where she also leads the Fund Development Committee. At home, she enjoys spending time with her family, cooking, and walking the Old Croton Aqueduct Trail with her Shiba Inu, Sonny. Every summer, Zoe travels to her homeland, Greece, with her husband, where they spend time with family, discover new hidden spots, and deepen their connections to their roots.

Tyler Scallorn brings nearly two decades of financial expertise to his role as Senior Vice President in Customers Bank's Financial Institutions Group. With a robust background spanning financial risk management, broker dealer lending, and strategic product development, Tyler has been in his clients' shoes and understands the complex issues they face. His professional journey includes roles at the Options Clearing Corporation, Texas Capital Bank, TD Ameritrade Institutional, and Charles Schwab before joining Customers Bank in 2022.

Tyler's professional philosophy centers on responsiveness, clarity, and unwavering diligence. His unique ability to focus on big picture outcomes while maintaining a meticulous eye for detail drive him to not just meet but exceed client expectations. In his role, Tyler primarily supports the Registered Investment Advisor (RIA) space. By combining deep industry knowledge with an entrepreneurial spirit, he brings innovative, out-of-the-box thinking that push the boundaries of traditional cash management and lending solutions for his clients and their stakeholders. In addition, Tyler has an exceptional ability to analyze complex financial information and convert intricate details into clear, actionable strategies with precision.

Tyler holds a BS in Finance from the University of Texas at Arlington and an MBA from Texas Christian University. He is a Chartered Financial Analyst (CFA) Charterholder and a graduate of the SIFMA Securities Industry Institute at The Wharton School. Tyler also previously held a FINRA Series 7 license. As a member of the CFA Society of Dallas/Fort Worth, he is an active leader in his local community.

Outside of work, Tyler is a curious and committed lifelong learner who shares a love of travel, food, and culture with his wife Liza and their two children, Anna and Benjamin. From exploring new cuisines and languages to staying active and continually seeking to understand how things work, Tyler brings the same passion and precision to his personal interests that he demonstrates in his professional endeavors.

customers bank

Brandon Troster brings 18 years of experience in the broker dealer and banking industries to his role as Senior Vice President in Customers Bank's Financial Institutions Group. His professional expertise lies in identifying, developing, and implementing innovative funding and cash management solutions for financial institutions.

Brandon’s career began in the broker dealer sector, where he spent seven years holding various positions in finance and trading, culminating in his role as Vice President of Treasury at Apex Clearing. In 2013, Brandon transitioned to a career in banking and joined Texas Capital Bank, where he became one of three founding members of a groundbreaking division focused on developing specialized products for broker dealers. Under his leadership, this innovative business line flourished, growing to manage over $5 billion in deposits and securing more than $1.3 billion in revolving credit lines within just five years. Drawn by Customers Bank's unique approach of nurturing small, close-knit teams and its commitment to serving niche markets, Brandon joined as Senior Vice President in 2021 to establish the Financial Institutions Group in Texas.

Clients working with Brandon can expect personalized service tailored to their unique needs, with a proactive approach that anticipates challenges and delivers customized solutions for success. His professional superpower is his ability to foster strong, enduring relationships with clients and third-party banks.

Brandon attended North Central Texas College. He’s also a graduate from the prestigious Securities Industry Institute at The Wharton School.

A proud Texas native, Brandon balances his professional achievements with a fulfilling family life. He enjoys spending quality time with his children, who are actively involved in sports, and a variety of outdoor activities including lake outings, playing golf, and horsing around at the family ranch in West Texas.

customers bank

With 19 years of dedicated banking expertise, **Maria Hartigan** brings an unparalleled commitment to client service as an Associate Client Manager in Customers Bank's Financial Institutions Group. With vast experience across a variety of roles in banking (from Teller to Lead Teller Operations Specialist, Personal Banker, and now Associate Client Manager), Maria has cultivated a deep understanding of financial solutions and how to best serve her clients. Her professional philosophy centers on making each client her top priority, consistently going above and beyond to provide personalized, one-on-one service.

Specializing in account opening and maintenance, Maria assists clients in fully leveraging the full suite of products and services offered at Customers Bank. Whether a client needs complex banking support or simple guidance, Maria approaches each interaction with enthusiasm and a problem-solving mindset.

Outside of work, Maria is the proud mother of two grown daughters residing in Rockland County, NY, where she enjoys writing, testing out new recipes in the kitchen, and staying active through hiking or working out at the gym. Born in Portugal, Maria came to the US when she was two-years-old and grew up returning to the country each summer with her family. Now, she travels to Portugal every other summer with her daughters to visit her mother. During their trips, the enjoy exploring Portugal's unique history, wonderful local eateries, and vineyards. Her personal passions reflect the same energy and commitment she brings to her role at Customers – always seeking opportunities for growth and learning and new experiences.