



**customers  
bank**

## Financial Institutions Group

With more than 50 years of combined experience, the Customers Bank Financial Institutions Group delivers a high-tech, high-touch banking experience to those in the financial services industry throughout the United States.

### Our goal?

To help you manage the complexities of growing an efficient and successful business – both now and in the future.

### What you can expect

In partnering with us, you tap into our relationship-based, single-point-of-contact approach that's tailored to your unique needs and supported by:

- An experienced team of bankers and former industry professionals that understand your industry and provide focused, personalized service
- A full suite of banking and financial services including lending, payments and cash management solutions
- Innovative tools and technology to enhance and simplify your banking experience

### Our Team

#### **Jake Danielski**

Managing Director,  
Financial Institutions  
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#### **Brandon Troster**

SVP/Financial Institutions  
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#### **Tyler Scallorn**

SVP/Securities Based Lending  
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#### **Zoe Mountroukas**

SVP/Financial Institutions  
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#### **Bill Cassidy**

SVP/Advisor Banking  
917-575-3445

#### **Maria Hartigan**

AVP/Associate Client Mngr.  
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*See reverse to explore more.*

**Let's take on tomorrow... together.**

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Member FDIC | Equal Housing Lender



## **Industries Served**

- Securities broker-dealers and futures commission merchants
- Registered Investment Advisors
- Trust and insurance companies
- Banks and FinTech firms
- Financial services providers

## **Innovative Deposit Solutions**

- FDIC insured sweep options
- SEC 15c3-3 Customer/PAB Reserve accounts
- Fully Paid Lending collateral accounts
- Operating and specialty accounts
- Virtual account subledgering

## **Specialized Lending Capabilities**

- General purpose secured revolving credit facilities
- Broker-dealer facilities for NSCC spikes, 15c3-3 timing differences and other short-term liquidity needs
- M&A/succession financing for RIA firms and streamlined securities-based loans for their end clients

## **Cash Management Services**

- Online, API and mobile banking
- Payables solutions - ACH, wires, SWIFT messaging
- Receivables solutions - ACH, remote check deposit, lockbox
- Fraud management solutions

## **To learn more**

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