



## Jeffrey Haller Joins Evercore as Senior Managing Director in the Financial Institutions Group

May 9, 2024

NEW YORK--(BUSINESS WIRE)--May 9, 2024-- Evercore announced today (NYSE: EVR) that Jeffrey Haller has joined the firm as a senior managing director in the financial institutions group based in New York.

Jason Sobol, co-head of U.S. Investment Banking, said, "Jeff has built a strong reputation as a leading advisor in the financial institutions sector, particularly to wealth and asset management firms. We are looking forward to welcoming him to the team to help drive the expansion of our financial institutions effort."

Mr. Haller added, "Evercore's distinct combination of independent, world-class advice and multiple client solutions make us uniquely positioned to meet our wealth and asset management clients' needs as they grow and evolve in a changing industry. I am excited to join this talented group of professionals to advise clients and partner with the Evercore team to grow our financial institutions coverage."

Mr. Haller has more than 20 years of experience working with financial institutions clients. Prior to joining Evercore, Mr. Haller was a managing director in the financial institutions investment banking group at Goldman Sachs, where he helped lead coverage of the wealth and traditional asset management sectors. Prior to joining Goldman Sachs in 2017, Mr. Haller was at RBC Capital Markets in New York and focused on building out investment banking coverage of the U.S. asset management sector. He also previously worked at Citigroup and Lehman Brothers.

Mr. Haller holds a B.S. in finance from Indiana University's Kelley School of Business.

### **About Evercore**

Evercore (NYSE: EVR) is a premier global independent investment banking advisory firm. We are dedicated to helping our clients achieve superior results through trusted independent and innovative advice on matters of strategic and financial significance to boards of directors, management teams and shareholders, including mergers and acquisitions, strategic shareholder advisory, restructurings and capital structure. Evercore also assists clients in raising public and private capital, delivers equity research and equity sales and agency trading execution, and provides wealth and investment management services to high-net-worth and institutional investors. Founded in 1995, the firm is headquartered in New York and maintains offices and affiliate offices in major financial centers in the Americas, Europe, the Middle East and Asia. For more information, please visit [www.evercore.com](http://www.evercore.com).

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