



Corporate News

CIBC welcomes new team members in San Francisco, Austin and Houston

CHICAGO, MAY 15, 2023—CIBC Private Wealth, US, today announced the following appointments:

- John McKenna is named San Francisco office head and senior relationship manager
- Robert Johnson is named senior vice president and business development officer in Austin
- Ryan Smith, CPWA®, is named senior vice president and senior relationship manager in Austin
- Geoff Nelson, CFP®, is named senior vice president and business development officer in Houston

John McKenna brings over 15 years of wealth management experience to CIBC Private Wealth as office head and senior relationship manager in San Francisco. he leads the office's client service team along with providing investment counseling services to a broad base of high net worth clients. Previously, he served as Chief Compliance Officer for Embarcadero Financial Group where he advised private clients and businesses on customized investment management and comprehensive financial planning. McKenna also acted as a co-portfolio counselor on the firm's investment committee. He earned a Masters of Business Administration from University of California's Haas School of Business and a bachelor's degree in Foreign Service from Georgetown University's Walsh School of Foreign Service.

Bringing more than 20 years of experience to his role as business development officer, **Rob Johnson** serves high-net-worth clients, foundations, endowments, trusted intermediaries, and family office clients. Prior to joining CIBC Private Wealth's Austin office, Johnson was head of wealth management at Realized, where he supported clients throughout the US with building custom portfolio strategies that aligned with their personalized investment goals and unique financial plans. He received a bachelor's degree in finance from The University of Connecticut and holds a certificate in family enterprises and wealth from Columbia Business School.

With over 20 years of industry experience, **Ryan Smith, CPWA®**, joins the firm as a senior relationship manager in Austin. In this role, he provides comprehensive investment and wealth strategy solutions to multi-generational families, business owners, corporate executives, and institutions. Previously, Smith served as a senior lead advisor at Venturi Private Wealth. He earned a bachelor's degree from Spring Hill College in Mobile and a Masters of Business Administration degree from the Cox School of Business at Southern Methodist University.

Geoff Nelson, CFP®, joins CIBC Private Wealth in Houston as a business development officer. In this role, he identifies and develops new and existing relationships with high net-worth individuals, organizations, and key intermediaries. Prior to joining the firm, Nelson served as a regional vice president at Mercer Advisors where he used his financial planning experience to help new clients implement investment, tax and estate planning strategies. He earned a Master of Business Administration degree from University of California, Davis and a bachelor's degree from Utah State University.

About CIBC

CIBC is a leading North American financial institution with 13 million personal banking, business, public sector and institutional clients. CIBC offers a full range of advice, solutions and services in the United States, across Canada and around the world. In the US, CIBC Bank USA provides commercial banking, private and personal banking and small business banking solutions while CIBC Private Wealth offers investment management, wealth strategies and legacy planning. Visit us at cibc.com/US.

For further information:

Kristy L. Daube, Director, US Media Relations, 770-617-0591, kristy.daube@cibc.com.

The CIBC logo is a registered trademark of CIBC, used under license. Private banking is offered by CIBC Bank USA, Member FDIC and  Equal Housing Lender. CIBC Bank USA and CIBC Private Wealth Group, LLC are both indirect, wholly owned subsidiaries of CIBC. The CIBC logo is a registered trademark of CIBC, used under license. Investment Products Offered are Not FDIC-Insured, May Lose Value and are Not Bank Guaranteed. Investment and Wealth Institute™ (The Institute) is the owner of the certification marks “CPWA®” and “Certified Private Wealth Advisor®. Use of CPWA® or Certified Private Wealth Advisor® signifies that the user has successfully completed The Institute’s initial and ongoing credentialing requirements for wealth advisors. The Certified Financial Planner Board of Standards Inc. owns the certification marks CFP® and CERTIFIED FINANCIAL PLANNER™ in the U.S.