CIBC PRIVATE WEALTH

Corporate News

CIBC expands US Private Wealth team

CHICAGO, MARCH 23, 2022—CIBC today announced the addition of six experienced professionals to its private banking and wealth management teams. The new hires reflect CIBC's ongoing commitment to enhance its capabilities across key US markets.

"Deepening our client relationships while delivering a full complement of CIBC's private banking and wealth management services is extremely important to us," said John S. "Jack" Markwalter, Jr., CEO of CIBC Private Wealth, US. "The addition of these experienced professionals will further our ongoing commitment to help our clients realize their ambitions for wealth and legacy across generations."

Diane McNeal is named managing director and national practice leader for private banking and consumer lending in West Palm Beach, Florida and Chicago, Illinois. With more than 35 years of combined private and commercial banking experience, McNeal provides leadership and expertise on custom credit, mortgage and deposit solutions to the private banking team. Previously, she served as regional managing director of the Florida and Atlanta markets for Wilmington Trust. McNeal earned a bachelor's degree in business administration, magna cum laude, from Adelphi University, with a double major in marketing and finance. She also earned a Master of Business Administration degree with high honors from Florida Atlantic University, with a concentration in legal compliance and risk management.

Nicholas Gibson, CWS®, joins as managing director and private wealth market manager in St. Louis, Missouri, with over 15 years of industry experience. In this role, he is responsible for assisting high net worth individuals and families in developing customized strategies designed to manage, protect and transfer their wealth through comprehensive planning, banking, credit and investment solutions. Prior to joining the firm, Gibson served as a senior wealth advisor at Regions Bank Private Wealth and Trust. He earned a bachelor's degree in economics and finance from the University of Missouri-St. Louis, and he holds the Certified Wealth Strategist® certification.

Gregory Botshon is named managing director and senior private banker in New York, New York, with over 30 years of experience. As a senior private banker, Botshon is responsible for providing integrated wealth management advice to high net worth individuals and families. He has significant experience managing complex private banking relationships and providing clients with strategic advice and guidance in structured credit and banking solutions, while focusing on investment management, trust and estate advisory, and financial planning. Previously, Botshon served as a private banker at U.S. Trust, Bank of America Private Bank. He earned a bachelor's degree in political science and economics from the University of Rochester and a Master of Business Administration degree in finance from the University of Michigan.

Bonnie R. Metcalfe , CFP®, CTFA, is a senior trust advisor in Wilmington, Delaware, with more than 20 years of industry experience. In this role, she is responsible for managing all aspects of trust administration and providing centralized day-to-day trust administration support.

Metcalfe also partners with relationship managers and client service associates to provide support for clients' trusts. Prior to joining the firm, Metcalfe served as a fiduciary advisor at Wilmington Trust. She earned a bachelor's degree in finance and a Master of Business Administration from Wilmington University, and holds the CERTIFIED FINANCIAL PLANNER™ (CFP) and Certified Trust and Financial Advisor (CTFA) designations.

Emily Wheeler joins as a private banker in Atlanta, Georgia, with more than 10 years of industry experience. In this role, she manages relationships of new and existing CIBC Private Wealth clients through the facilitation of credit, lending and deposit services. Prior to joining the firm, Wheeler served on the Global Corporate and Institutional Advisory Services team at Merrill Lynch. She earned a bachelor's degree from the University of South Carolina, and holds the Nationwide Mortgage Licensing System certification and has specialized in lending since 2014.

Kevin Hauri is a senior relationship manager in Newport Beach, California, with over 15 years of industry experience. In this role, he provides comprehensive wealth management solutions designed to help successful individuals, high net worth families and organizations achieve their financial and philanthropic goals. Prior to joining the firm, Hauri served as a portfolio manager at City National Rochdale. He earned a bachelor's degree in psychology from the University of California, Irvine and a Master of Business Administration from the University of Southern California. He also holds the Chartered Financial Analyst® designation and is a member of the CFA Society of Orange County, the CFA Society of Los Angeles and the CFA Institute.

About CIBC

CIBC is a leading North American financial institution with 11 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 and 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.