



## Four Wealth Managers Join First Republic in New York

May 26, 2020

SAN FRANCISCO--(BUSINESS WIRE)--May 26, 2020-- [First Republic Bank](#) (NYSE:FRC), a leading private bank and wealth management company, today announced that Steve Condos, Kenneth Morris, Fortune S. Macri III, and Jared Katzman have joined First Republic Investment Management.

Condos and Morris were each named Managing Director and Wealth Manager. Macri and Katzman were each named Vice President and Wealth Manager. They will provide wealth management services, including investment management, retirement planning and wealth transfer strategies, to individuals, families, nonprofits and private family foundations. They will be based in New York City.

"Steve Condos, Kenneth Morris, Fortune Macri, and Jared Katzman are highly regarded wealth managers and a significant addition to our expanding team in the New York area," said Bob Thornton, President of First Republic Private Wealth Management. "They share First Republic's commitment to exceptional client service."

Condos has more than 30 years of wealth management experience. Previously, he was a Managing Director at Morgan Stanley Private Wealth Management and a Sports and Entertainment Director at Morgan Stanley Global Sports & Entertainment, where he led a nationally recognized team focused on the complex wealth management needs of high net worth clients. Condos attended the Environmental and Biological Sciences School at Rutgers University. He has been recognized in a number of industry rankings, including *Forbes* Best-In-State Wealth Advisors, *Barron's* Top Advisor Rankings by State and *Financial Times* 400 Top Financial Advisers.

Morris has more than 20 years of wealth management experience. Previously, he was a Senior Vice President at Morgan Stanley Private Wealth Management and a Sports and Entertainment Director at Morgan Stanley Global Sports & Entertainment. Morris provides clients with holistic wealth management solutions and guidance, including customized wealth transfer and estate planning strategies. He earned a bachelor's degree in International Business and Finance from Hofstra University's Frank G. Zarb School of Business. Morris is a CERTIFIED FINANCIAL PLANNER™ professional. Morris has been recognized on a number of industry rankings, including *Forbes* Best-In-State Wealth Advisors.

Katzman has more than 11 years of wealth management experience. Previously, he was First Vice President at Morgan Stanley Private Wealth Management. He focuses on portfolio management and business development, and the construction of comprehensive wealth management strategies. Katzman earned a bachelor's degree in Business Management and an MBA in Marketing from Lynn University. He has been recognized as a *Forbes* Top Next-Gen Wealth Advisor.

Macri has more than 10 years of wealth management experience. Previously, he was an Associate Vice President at Morgan Stanley Private Wealth Management. He provides comprehensive financial management, including asset management and wealth transfer planning for high net worth individuals and families, endowments, foundations and family offices. Macri earned a bachelor's degree in Business Management and Economics and an MBA in Finance from Fordham University, Gabelli School of Business.

To learn more about First Republic Private Wealth Management, [click here](#). To see our growing team of wealth management professionals, [click here](#).

### About First Republic Bank

Founded in 1985, First Republic and its subsidiaries offer private banking, private business banking and private wealth management, including investment, trust and brokerage services. First Republic specializes in delivering exceptional, relationship-based service and offers a complete line of products, including residential, commercial and personal loans, deposit services, and wealth management. Services are offered through preferred banking or wealth management offices primarily in San Francisco, Palo Alto, Los Angeles, Santa Barbara, Newport Beach and San Diego, California; Portland, Oregon; Boston, Massachusetts; Palm Beach, Florida; Greenwich, Connecticut; New York, New York; and Jackson, Wyoming. First Republic is a constituent of the S&P 500 Index and KBW Nasdaq Bank Index. For more information, visit [firstrepublic.com](http://firstrepublic.com).

View source version on [businesswire.com](https://www.businesswire.com/news/home/20200526005084/en/): <https://www.businesswire.com/news/home/20200526005084/en/>

#### Investors:

Andrew Greenebaum / Lasse Glassen  
Addo Investor Relations  
[agreenebaum@addoir.com](mailto:agreenebaum@addoir.com)  
[lglassen@addoir.com](mailto:lglassen@addoir.com)  
(310) 829-5400

#### Media:

Greg Berardi  
Blue Marlin Partners  
[greg@bluemarlinpartners.com](mailto:greg@bluemarlinpartners.com)  
(415) 239-7826

Source: First Republic Bank