



## Wealth Management Team Led by Harold Reinstein and Michael Nelson Joins First Republic

September 26, 2022

SAN FRANCISCO--(BUSINESS WIRE)--Sep. 26, 2022-- [First Republic Bank](#) (NYSE:FRC), a leading private bank and wealth management company, today announced that a nine-member team led by Harold Reinstein and Michael Nelson have joined First Republic Investment Management in Scarsdale, New York.

Reinstein and Nelson were each named Managing Director and Wealth Manager. Daniel Sirota and Pascale Hainline were each named Senior Vice President and Wealth Manager, and Kimberly Ferry was named Vice President and Wealth Manager.

They will provide portfolio management, retirement planning, investment consulting and other wealth management services to individuals, families, nonprofits and private family foundations.

"Harold Reinstein, Michael Nelson and the team are accomplished wealth managers who share First Republic's commitment to exceptional client service," said Bob Thornton, President of First Republic Private Wealth Management. "They will further strengthen our ability to serve the New York metropolitan area."

Reinstein has more than 28 years of wealth management experience providing customized wealth management solutions for high net worth families and individuals. Before joining First Republic, he was a Managing Director at Merrill Lynch Wealth Management. Active in his local community, Reinstein has done volunteer work for many years for foundations, endowments and ERISA plans. He received a Bachelor of Science degree in Finance and a Bachelor of Arts degree in English literature from the State University of New York at Buffalo. Reinstein holds the CERTIFIED FINANCIAL PLANNER™, Certified Plan Fiduciary Advisor™ and Chartered Retirement Planning Counselor® designations.

Nelson has more than 23 years of wealth management experience providing customized wealth management solutions for corporate clients, with a particular focus on retirement planning. Before joining First Republic, he was a Managing Director at Merrill Lynch Wealth Management. Nelson is active in his local community and has served as a volunteer coach for youth sports teams for over a decade. He holds the Chartered Retirement Planning Counselor™ and Certified Plan Fiduciary Advisor™ designations. Nelson also attended TRAU™, the Retirement Advisor University at UCLA Anderson School of Management Executive Education and received the Certified 401(k) Professional designation. He studied at the Wharton School of Business and received the CIMA® designation from the Investments & Wealth Institute™. Nelson is also a CERTIFIED FINANCIAL PLANNER™ professional.

Sirota has more than 22 years of wealth management experience providing comprehensive, customized wealth management solutions for clients. Before joining First Republic, he was a Senior Vice President at Merrill Lynch Wealth Management. Active in his local community, Sirota has served on the board of directors for the Juvenile Diabetes Research Foundation for the Westchester Chapter and was a member of the board for the Cornell University Alumni Association of Westchester. He received a Bachelor of Science degree from Cornell University, and a Master of Business Administration degree and a Master of Public Health degree from Columbia University. Sirota holds the Chartered Retirement Planning Counselor® and Certified Plan Fiduciary Advisor™ designations.

Hainline has more than 20 years of experience in corporate and investment banking, and more than 13 years of wealth management experience providing customized wealth management solutions for high net worth families and individuals. Before joining First Republic, she was a Senior Vice President at Merrill Lynch Wealth Management. Hainline is active in her local community and is a member of the board of New York Edge, a nonprofit organization that bridges the opportunity gap through academics, sports and art for underserved students. Hainline also serves as a Governor-at-Large of the International Tennis Hall of Fame. She received a Master's degree in Economics from Paris Sorbonne University and a post-Master's Fellowship Award in Economics from the University of Chicago. Hainline holds the Chartered Retirement Planning Counselor® and Certified Plan Fiduciary Advisor designations.

Ferry has more than 19 years of wealth management experience providing customized wealth management solutions for high net worth clients. Before joining First Republic, she was a Vice President at Merrill Lynch Wealth Management. Ferry is active in her local community and is member and volunteer at United for the Troops and Feeding Westchester, in Westchester, New York. She also volunteers with The Church of the Presentation in Upper Saddle River, New Jersey and the Hudson Valley Girl Scouts. Ferry received a Bachelor of Arts degree from Armstrong Atlantic State University and an MBA degree from Colorado State University. She is a CERTIFIED FINANCIAL PLANNER™ professional.

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. First Republic specializes in delivering exceptional, relationship-based service and provides a complete line of products, including residential, commercial and personal loans, deposit services, and private wealth management, including investment, brokerage, insurance, trust and foreign exchange services. 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; Jackson, Wyoming; and Bellevue, Washington. First Republic is a constituent of the S&P 500 Index and KBW Nasdaq Bank Index. For more information, visit [firstrepublic.com](https://www.firstrepublic.com).

FRC-G

View source version on [businesswire.com](https://www.businesswire.com/news/home/20220926005085/en/): <https://www.businesswire.com/news/home/20220926005085/en/>

Investors:

Andrew Greenebaum / Lasse Glassen

Addo Investor Relations

[agreenebaum@addo.com](mailto:agreenebaum@addo.com)

[lglassen@addo.com](mailto:lglassen@addo.com)

(310) 829-5400

Media:  
Greg Berardi  
Blue Marlin Partners  
[gberardi@firstrepublic.com](mailto:gberardi@firstrepublic.com)  
(415) 239-7826

Source: First Republic Bank