



Eight-Member Wealth Management Team Joins First Republic

November 14, 2022

Team Is Led by Jeremy McChesney, Marci Rosenfeld, Jim Morehouse, Todd Duncan, and Jessica Huang

SAN FRANCISCO--(BUSINESS WIRE)--Nov. 14, 2022-- [First Republic Bank](#) (NYSE:FRC), a leading private bank and wealth management company, today announced that an eight-person team led by Jeremy McChesney, Marci Rosenfeld, Jim Morehouse, Todd Duncan, and Jessica Huang has joined First Republic Investment Management.

McChesney, Rosenfeld, Morehouse and Duncan and were each named Managing Director and Wealth Manager. Huang was named Vice President and Wealth Manager. Based in Palo Alto, the team will provide portfolio management, retirement planning, investment consulting and other wealth management services to individuals, families, nonprofits and private family foundations.

"Jeremy McChesney, Marci Rosenfeld, Jim Morehouse, Todd Duncan, Jessica Huang, and their team share First Republic's commitment to exceptional client service," said Bob Thornton, President of First Republic Private Wealth Management. "They are a very strong addition to First Republic and will help us meet the growing needs of our clients on the Peninsula and in Silicon Valley."

McChesney has more than 13 years of wealth management experience providing customized solutions for Silicon Valley technology entrepreneurs and executives, with a focus in cash-flow modeling and retirement planning. Before joining First Republic, he was a Private Wealth Financial Advisor and Managing Director – Investments at Wells Fargo Advisors. McChesney received a Bachelor of Arts degree in Communications from the University of California, Davis. He is a CERTIFIED FINANCIAL PLANNER™ professional.

Rosenfeld has more than 20 years of wealth management experience providing customized solutions for corporate executives, entrepreneurs and investors transitioning their businesses through mergers and acquisitions. Before joining First Republic, Rosenfeld was a Managing Director and Private Wealth Advisor at Wells Fargo Private Bank. Prior to that, she was Head of Integrated Strategies Group at Deutsche Bank National Trust Company. Rosenfeld has been active in her local community for many years and is currently the Chair of the Board of Trustees for Working Solutions CDFI, a San Francisco-based community development financial institution providing entrepreneurs with affordable small-business loans. Rosenfeld is also the Vice Chair of the Board of Trustees of the Contemporary Jewish Museum in San Francisco. She received a Bachelor of Arts degree, graduating magna cum laude with an honors distinction in Biology, from the University of Pennsylvania and a Juris Doctor degree from the Columbia University School of Law.

Morehouse has nearly 10 years of wealth management experience providing customized solutions for executives and entrepreneurs. Before joining First Republic, he was a Senior Financial Advisor and Senior Vice President – Investments at Wells Fargo Advisors. Morehouse received a Bachelor of Arts degree from California State University, Chico. He has also completed the Personal Financial Planning curriculum at the University of California, Los Angeles.

Duncan has more than 20 years of wealth management experience providing customized solutions for business owners, private equity executives, tech entrepreneurs and executives, and professional athletes. He specializes in portfolio construction, implementation and management. Before joining First Republic, Duncan was a Lead Private Wealth Portfolio Manager at Wells Fargo Private Bank. Prior to that, he was a Portfolio Manager at Enterprise Trust and Investment Company. Active in his local community for many years, Duncan is currently a member of the Investment Committee for Bellarmine College Preparatory. He received an MBA from the Lucas College of Business at San Jose State University. Duncan holds the Chartered Financial Analyst® designation.

Huang has more than 11 years of wealth management experience providing customized solutions for high net worth individuals, Silicon Valley entrepreneurs and executives. Before joining First Republic, she was a Vice President and Investment Officer at Wells Fargo Advisors. Huang received a Bachelor of Arts degree in Economics from the University of Texas at Austin. 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](#).

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