



## 12-Member Wealth Management Team Led by Derek Mohamed and Justin Merola Joins First Republic

January 17, 2023

SAN FRANCISCO--(BUSINESS WIRE)--Jan. 17, 2023-- [First Republic Bank](#) (NYSE:FRC), a leading private bank and wealth management company, today announced that a 12-person team led by Derek Mohamed and Justin Merola has joined First Republic Investment Management.

Mohamed and Merola were each named Managing Director and Wealth Manager. Stephen Greene, Brian Kelleher and Leland Mindnich were each named Vice President and Wealth Manager. Based in the Boston area, the team will provide portfolio management, retirement planning, investment consulting and other wealth management services to individuals, families and nonprofits.

"Derek Mohamed, Justin Merola, Stephen Greene, Brian Kelleher, Leland Mindnich and their team are a terrific addition to our growing wealth management capabilities in the greater Boston area," said Bob Thornton, President of First Republic Private Wealth Management. "They share First Republic's commitment to exceptional client service."

Mohamed has more than 20 years of wealth management experience providing customized solutions for individuals, families, executives and business owners. Before joining First Republic, Mohamed was a Managing Director and Wealth Management Advisor at Merrill Lynch Wealth Management. Prior to that, he worked at UBS and Morgan Stanley. Active in his local community, Mohamed has been a volunteer youth hockey coach for many years and also supports several educational institutions and nonprofit organizations, including the Boys & Girls Clubs of MetroWest, the Navy Seal Foundation and Grace Church. He is also an active member of the Young Presidents' Organization. Mohamed received a Bachelor of Arts degree in Economics from Assumption University. He also attended the College for Financial Planning, the Investments and Wealth Institute and the Exit Planning Institute. Mohamed holds the Certified Private Wealth Advisor®, Certified Retirement Planning Counselor®, Accredited Asset Management Specialist<sup>SM</sup> and Certified Exit Planning Advisor designations.

Merola has nearly 20 years of wealth management experience providing customized solutions for individuals and families. Before joining First Republic, Merola was a Senior Vice President and Senior Financial Advisor at Merrill Lynch Wealth Management. Prior to that, he worked at UBS and Morgan Stanley. Merola is active in his local community and is a member of the board of the Greater Boston Chapter of the Exit Planning Exchange. He also supports his alma maters, Northeastern University in Boston and Notre Dame High School in West Haven, Connecticut. Merola received a Bachelor of Science degree with a dual concentration in Finance and Management from Northeastern University. He holds the Certified Fiduciary Plan Advisor®, Certified Retirement Planning Counselor® and Certified Exit Planning Advisor designations.

Greene has 15 years of wealth management experience providing customized solutions for high net worth individuals, families, executives and business owners. Before joining First Republic, Greene was a Senior Wealth Planner at Merrill Lynch Wealth Management. Prior to that, he was at UBS and was a Registered Representative with the Ayco Company, a subsidiary of Goldman Sachs. Greene received a Bachelor's degree from SUNY Oneonta. He holds the Chartered Financial Consultant® and Certified Retirement Planning Counselor® designations.

Kelleher has more than 10 years of wealth management experience providing customized solutions for high net worth individuals, families, executives and business owners. Before joining First Republic, Kelleher was a Financial Advisor at Merrill Lynch Wealth Management. Prior to that, he was a Wealth Planner with Ballentine Partners. Kelleher received a Bachelor's degree with a double major in Corporate Finance and Accounting & Global Perspectives. He is a CERTIFIED FINANCIAL PLANNER<sup>TM</sup> professional and holds the Certified Exit Planning Advisor designation.

Mindnich has more than 10 years of wealth management experience providing customized solutions for high net worth individuals, families, executives and business owners. Before joining First Republic, Mindnich was a Senior Financial Advisor at Merrill Lynch Wealth Management. Prior to that, he was an investment professional at Cetera Financial Group. He received a Bachelor's degree from Clemson University and holds the Certified Exit Planning Advisor designation.

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).

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Investors:

Andrew Greenebaum / Kimberly Esterkin  
Addo Investor Relations  
[agreenebaum@addo.com](mailto:agreenebaum@addo.com)  
[kesterkin@addo.com](mailto:kesterkin@addo.com)  
(310) 829-5400

Media:

Greg Berardi  
Blue Marlin Partners  
[gberardi@firstrepublic.com](mailto:gberardi@firstrepublic.com)

(415) 239-7826

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