

Meet the Financial Institutions Group

About the Financial Institutions Group

Customers Bank Financial Institutions Group (FIG) is composed of five team members with extensive experience in providing banking services to financial institutions including securities broker-dealers, trust companies, RIAs, community banks, fintechs and insurance companies. Due to the highly specialized and regulated nature of the industry, these businesses benefit from bankers with an intimate understanding of their operations, limitations and compliance requirements.

What sets the team apart?

Expertise. Several members of the team have been in our customers' shoes. With firsthand experience in fintech, securities and wealth management, the FIG team knows its clients' businesses and how Customers Bank can help accelerate their success.

From your perspective, what sets Customers apart?

Customers Bank's Single Point of Contact service delivery model coupled with its flat organizational structure enable us to serve customers with agility, while keeping them at the forefront of decision-making. Here, teams are empowered to bring innovative, compelling deposit and lending solutions directly to their clients with speed and decisiveness.

Meet the FIG Team



Jake Danielski
Managing Director



Bill Cassidy
Senior Vice President



Zoe Mountroukas
Senior Vice President



Brandon Troster
Senior Vice President



**Stephanie Maxwell-
Azevedo**
Associate Client Manager

Let's take on tomorrow.

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Jake Danielski serves as Managing Director of Customers Bank's Financial Institutions Group. With over 19 years of banking experience, Jake works with a variety of financial institutions — including broker dealers, RIAs, fintech firms, and trust companies — to create new opportunities, streamline processes, and enhance client experiences in ways others might not consider. His expertise lies in bridging internal and external banking environments and understanding complex financial systems while delivering practical, tailored solutions for customers.

Jake began his banking career as a teller in a New York City bank branch where he worked his way through branch management to oversee multiple locations before transitioning to a Business Banking Relationship Manager. In 2013, he joined Customers Bank as a Client Manager when it was a \$2.1 billion institution, becoming one of its first four team members in New York City. Jake's entrepreneurial vision was pivotal in introducing a small, high-touch banking team model to the Bank where decisions were made locally, and services were tailored to fit clients' unique needs. With help from his leadership, the New York division grew into a thriving operation employing hundreds and managing billions in loans and deposits while maintaining its entrepreneurial spirit. In 2021, Jake took on the role of Texas Market Executive, successfully launching Customers Bank's first Texas office. Later that year, he founded the Financial Institutions Group (FIG).

Customers working with Jake can expect a true relationship banker and advocate who is transparent, realistic and committed to delivering on promises. He prioritizes trust, follow-through and long-term partnerships over short-term wins. As an innovator, he consistently brings fresh ideas that challenge the status quo and drives meaningful improvements both within Customers Bank and for his clients. Jake describes his professional superpower as being a calculated risk-taker who creates enthusiasm and momentum, inspiring both team members and clients to rally behind a vision. His ability to engage, motivate and execute has been a driving force in building successful teams and banking solutions.

Jake holds a BS in finance from City University of New York - Baruch College, Zicklin School of Business, and is currently enrolled in the Securities Industry Institute at the Wharton School. He previously held the designation of Certified Anti-Money Laundering Specialist (CAMS).

Beyond his professional accomplishments, Jake draws his greatest motivation from his 8-year-old son, Grayson, who survived a brain tumor. After an extensive surgery and subsequent 30-day coma, Grayson had to relearn how to breathe, talk, eat, walk and move — a journey of relentless perseverance that continues today. Witnessing his son's strength and resilience serves as a constant reminder to Jake that with the right mindset, any challenge can be overcome.

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Bill Cassidy brings over three decades of comprehensive financial services experience to his role as Senior Vice President in Customers Bank's Financial Institutions Group (FIG). His diverse career spans both banking and wealth management, giving him a unique perspective and valuable insight in his role leading Advisor Banking for FIG and working predominately with Registered Investment Advisors and their clients.

Bill's banking career includes four years as Vice President in Cash Management at Bank of America, six years as Executive Vice President at The Bancorp Bank, and three years as Managing Director at Advisor Credit Exchange. Prior to banking, Bill spent more than 30 years in wealth management, working with broker-dealers and asset management firms, including over 22 years with SEI in the United States and Asia.

Joining Customers in 2024, Bill was drawn to the Bank for its forward-thinking profile and opportunity to serve as a strategic banking and lending partner for wealth management firms. Customers working with Bill benefit from his deep understanding of their business models and the markets they operate in. His firsthand experience in wealth management allows him to comprehend the challenges and market dynamics facing professionals in the space in ways few bankers can.

A Penn State University graduate, Bill previously held several financial industry credentials including FINRA Series 6, 63, 7 and 24 licenses, as well as Principal Designations for Advising (Type 4) and Portfolio Management (Type 9) from the Hong Kong Securities & Futures Commission.

Bill is actively involved with several community organizations including Wreaths Across America, Tunnels to Towers and the Union League of Philadelphia. He resides in Wayne, Pennsylvania, with his wife, Vicki, and their dog, Boomer. As the proud parent of three adult children living in Boston and Philadelphia, Bill considers family both a hobby and a vocation. His personal interests include travel (having visited all 50 states with just two continents left to explore), fitness, cooking, sports, photography and writing.

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Zoe Mountroukas, Senior Vice President at Customers Bank, specializes in delivering high-tech, high-touch service and a full suite of deposit and lending solutions to help financial institutions grow and operate more efficiently. As a member of the Bank's Financial Institutions Group, Zoe primarily supports trust companies with crafting innovative deposit growth opportunities and maximizing cash management strategies to support long-term success.

With nearly a decade at Customers Bank, Zoe has achieved remarkable success through her tenacity, open-minded approach and entrepreneurial mindset. Early in her career, she managed a banking team in the New York metro area, the only women-led team at that time. Zoe has played a pivotal role in driving significant deposit growth and introducing key solutions to the Bank that have since been incorporated into FIG's product offerings. In 2020, she was honored with the Customers Bank Chairman's Award in recognition of her outstanding contributions.

With over 30 years dedicated to commercial banking, Zoe takes a straightforward approach to supporting her clients' goals. She carefully listens to their needs, develops creative strategies to maximize returns and delivers insights to drive growth. Customers can expect a highly personalized banking experience when working with Zoe. As their single point of contact, she knows their business, challenges and opportunities intimately and provides seamless, efficient service tailored to their unique financial needs.

Prior to joining Customers Bank in 2015, Zoe held a variety of positions at Citi and Chase. She holds a BS in business administration from Fordham University's Gabelli School of Business. This comprehensive financial education and background enables Zoe to tackle complex deals with a refreshingly smooth and personable approach.

A leader in the Irvington, New York, community, Zoe serves on the board of the Port Chester Rye Brook Chamber of Commerce and Read Alliance, where she also leads the Fund Development Committee. At home, she enjoys spending time with her family, cooking and walking the Old Croton Aqueduct Trail with her Shiba Inu, Sonny. Every summer, Zoe travels to her homeland, Greece, with her husband, where they spend time with family, discover new hidden spots and deepen their connections to their roots.

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Brandon Troster brings 18 years of experience in the broker-dealer and banking industries to his role as Senior Vice President in Customers Bank's Financial Institutions Group. His professional expertise lies in identifying, developing, and implementing innovative funding and cash management solutions for financial institutions.

Brandon's career began in the broker-dealer sector, where he spent seven years holding various positions in finance and trading, culminating in his role as Vice President of Treasury at Apex Clearing. In 2013, Brandon transitioned to a career in banking and joined Texas Capital Bank, where he became one of three founding members of a groundbreaking division focused on developing specialized products for broker-dealers. Under his leadership, this innovative business line flourished, growing to manage over \$5 billion in deposits and securing more than \$1.3 billion in revolving credit lines within just five years. Drawn by Customers Bank's unique approach of nurturing small, close-knit teams and its commitment to serving niche markets, Brandon joined as Senior Vice President in 2021 to establish the Financial Institutions Group in Texas.

Customers working with Brandon can expect personalized service tailored to their unique needs, with a proactive approach that anticipates challenges and delivers customized solutions for success. His professional superpower is his ability to foster strong, enduring relationships with clients and third-party banks.

Brandon attended North Central Texas College. He's also a graduate from the prestigious Securities Industry Institute at The Wharton School.

A proud Texas native, Brandon balances his professional achievements with a fulfilling family life. He enjoys spending quality time with his children, who are actively involved in sports, and a variety of outdoor activities including lake outings, playing golf and horsing around at the family ranch in West Texas.

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Stephanie Maxwell-Azevedo brings more than 30 years of banking experience to her role as AVP, Client Manager at Customers Bank. With a career spanning client service and operations — from cashier and vault operations to treasury services and client onboarding — Stephanie offers a uniquely well-rounded perspective that allows her to support customers clarity, care, and deep expertise.

During her financial services career, Stephanie has held a variety of roles across both back-office operations and client-facing positions, including Institutional Relationship Manager and Wealth Management Onboarding Specialist. This broad experience fuels her ability to guide customers through complex onboarding and post-funding processes with confidence and precision.

Stephanie was drawn to Customers Bank's focus on operational excellence and close-knit collaboration. Clients appreciate her honest, kind and genuinely welcoming approach, along with her commitment to exceptional service. Her dedication has been recognized with a Peer Recognition Award for excellence and teamwork.

Stephanie attended Hunter College where she earned a BA in 19th-century British literature with a minor in history. Beyond her professional commitments, she also serves as a Global Village Leader with Habitat for Humanity.

Stephanie lives in Yonkers, New York, and is a Long Island native with memorable stints in California and Portugal. A lifelong athlete, she played soccer for 33 years and has recently taken up boxing. Her personal journey — balancing a full-time career while supporting a child with Autism Spectrum Disorder — has strengthened her organizational acumen and deepened her commitment to empathy, structure and effective communication.

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