



Bank Team Analyst Marketing Bank Forum Takeaway Conference Call

Tuesday, September 29 at 12:00pm ET/11:00am CT

Stephens is hosting a conference call for institutional investors with our five research analysts covering the bank sector. This call will discuss takeaways from the Stephens Bank Forum.



Terry McEvoy, CFA

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Terry McEvoy is a managing director and research analyst following the U.S. banking sector. Prior to joining the firm in May 2015, Terry served as head of Bank Research at Sterne Agee, leading a group of six senior equity analysts that formally covered 140+ bank stocks. Terry spent 13 years in a similar role at Oppenheimer & Co. Prior to that, he worked for five years as a bank analyst at Tucker Anthony Capital Markets. Terry was named the #3 Earnings Estimator in the Commercial Banking industry by Financial Times/StarMine in 2008 when profitability within the sector hit an important inflection point. In 2010 the Financial Times/StarMine named him the #2 Stock Picker in the Commercial Banking industry which was the first year in nearly a decade the sector outperformed the S&P 500. Terry was one of the founding members/ Board of Directors of the CFA Society of Maine.



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Matt is a managing director following regional banks with an emphasis in the Southwest U.S. region. He joined Stephens in 2004 and has been an analyst covering the regional bank sector since 2007. In 2010, Matt was recognized by StarMine as a Top Earnings Estimator for the Commercial Banking Industry. Prior to joining Stephens Inc., Matt resided in Houston, TX, where he worked in various roles for Wells Fargo and UBS. He holds a B.B.A. with a focus in finance and management information systems from the University of Oklahoma. Matt earned his Chartered Financial Analyst (CFA) designation in 2007.



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Matthew Breese is a managing director and research analyst covering the Northeast Regional Banks. Prior to joining Stephens in 2019, Matt was a research analyst at Piper Jaffray Companies. Mr. Breese has focused on regional and community banks for more than a decade. StarMine named Mr. Breese the No. 3 stock picker in 2019 and 2018, the No. 1 stock picker in 2015, as well as the No. 3 earnings estimator in 2018 and 2015 for the thrift and mortgage finance segment. Mr. Breese began his career in 2008 with Sterne Agee & Leach, Inc.



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Brody Preston is a vice president and research analyst covering regional and community banks across the Mid-Atlantic, Southeast, and Northeast. Prior to joining Stephens in 2019, Brody was a research associate at Piper Jaffray Companies since 2016 focused on Northeast and Mid-Atlantic banks. Brody graduated from Salem State University with B.S.B.A in finance. Brody earned his Chartered Financial Analyst (CFA) designation in 2019.



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Gordon McGuire is a research analyst focused on banks in the Western region of the U.S. Gordon began his career at Stephens in 2015 as a research associate within the regional banks sector. Prior to joining Stephens, Gordon received his J.D. and M.B.A. degrees from Tulane University where he graduated Beta Gamma Sigma in Tulane's business program. Gordon graduated with honors from the University of Central Arkansas in 2011 with a B.B.A. in Finance.

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