

The Burke Group, LLC announces strategic combination with Roger G. Powell, LLC; expands footprint, skill sets, and senior level depth

The Burke Group, LLC (“TBG”) is pleased to announce that it has partnered with Roger G. Powell, LLC, an established consulting and investment banking firm led by Roger Powell. Roger will join TBG as a Managing Director and will add decades of experience advising community banks and other financial institutions. Roger’s clients include banks from the Carolinas to Pennsylvania and will be a natural geographic extension for TBG. TBG also recently announced the hiring of David Walton, an experienced M&A professional who has spent the last decade assisting financial institutions in the South and Midwest.

Jon Burke, founder of TBG, said “We couldn’t be more pleased to add a banker with the skills, background, and reputation of Roger. I’ve known him for over 30 years and have always seen him put his clients’ interests first and provide straightforward, unbiased advice. The addition of Roger combined with our recent hiring of David Walton underscores our commitment to providing world-class services to our clients.”

Roger added “I am pleased to join The Burke Group. I respect the quality of their work and their dedication to their clients’ business plans. I look forward to being a part of their team and hope to add to their client base and reputation.”

Roger has assisted community and regional banks, specialty finance companies, and their strategic vendors in a wide variety of financing and corporate development transactions over the past 40 years. As the founder of Roger G. Powell, LLC, he led a multitude of consulting and investment banking projects. Prior to that, he was a Managing Director with Janney Montgomery Scott, Deutsche Bank Securities, and Alex. Brown & Sons. He received a Bachelor of Arts in Economics from Davidson College and the Advanced Management Certificate from the North Carolina School of Banking at Chapel Hill.

David Walton joins TBG as a Senior Vice President after spending over 4 years at Piper Jaffray, where he assisted financial institutions in the Southeast, Southwest, and Midwest. David has spent over 10 years serving depository institutions and other financial services companies and has executed over 30 whole bank M&A transactions with an aggregate deal value exceeding \$2.0 billion. Prior to Piper Jaffray, he worked at SunTrust Robinson Humphrey and Sandler O’Neill. David earned a Bachelor of Arts in Economics, magna cum laude, from Washington & Lee University.

About The Burke Group, LLC

The Burke Group is a trusted community bank consultant whose primary goal is to give our clients honest, objective advice. With 100+ years of combined experience, The Burke Group provides value driven community banking services including M&A advisory, fairness opinions, capital raising, debt restructuring, strategic planning, and private company valuations. Our independent, team-owned approach provides clients with a unique combination of industry expertise and problem-solving flexibility.

For more information, please contact:

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