Truist Investor Relations

# Truist appoints new leadership for Truist Wealth and Premier teams in Texas

*Truist Wealth names Joe Levi North Texas Regional Managing Director, hiresErik Carrington as Houston and Central Texas Regional Managing Director*

*Ryan Thompson appointed Premier Region Director*

CHARLOTTE, N.C., Oct. 7, 2025 /PRNewswire/ -- Truist Financial Corporation (NYSE: TFC) today announced new leadership for its Truist Wealth and Premier teams in Texas.

Truist's new leadership additions highlight its commitment to deepening its presence and delivering exceptional wealth management solutions to affluent and high-net-worth clients across the state.

**Truist Wealth**
Joe Levi was named regional managing director for North Texas and will oversee Truist Wealth's teams across Dallas, Ft. Worth and the broader region. Based in Dallas, Levi brings more than 25 years of experience in wealth management to his role, having previously served as managing director and senior wealth advisor for Truist Wealth in Nashville. Known for his growth-oriented mindset and ability to build high-performing teams through collaboration, Levi integrates his background as a CERTIFIED FINANCIAL PLANNER® to strengthen client relationships and attract new business.

Joining the Truist Wealth team based in Houston, Texas, Erik Carrington will serve as regional managing director for Houston and Central Texas. Carrington has an impressive 30 years of experience within the banking and investment management industry. He has held pivotal positions at Morgan Stanley and UBS where he built and led successful wealth management teams and divisions.

"Joe and Erik's deep industry experience and dedication to cultivating high-performing teams make them key additions to our team in Texas," said Head of Truist Wealth Brian Dowhower. "Their leadership will help us continue to grow our presence in Texas and bring our purpose driven wealth experience to life by helping to ensure our clients receive holistic and collaborative wealth management services."

Levi and Carrington will work closely with Troy Schiermeyer, who leads Truist Wealth's financial advisor teams in Texas as the brokerage division director for Truist Investment Services, Inc. to provide high- and ultra-high-net worth clients with comprehensive and tailored wealth management solutions.

**Truist Premier**
Leading the Premier Banking team in Texas, Premier Region Director Ryan Thompson brings nearly 15 years of banking experience to his role and is based in Houston. Thompson oversees Premier Banking teammates across Texas who serve affluent clients with $250,000 in assets or more at Truist. The team focuses on clients' more complex financial needs through an advice-driven, relationship-based approach.

"Ryan's leadership across the state of Texas comes at an exciting time for Truist as we expand our branch network and grow our Premier team to care for the unique needs of our affluent client base," said Head of Premier Banking Scott Stearsman. "We're focused on delivering a holistic experience that rewards clients with exclusive benefits, personalized guidance, and proactive partnership through our advice-driven, relationship-based approach, and we're confident in Ryan's ability to deliver for our clients."

**Continued Investment in Texas**
The appointments and hires follow Truist's announcement of significant investments over the next five years to attract new and grow existing client relationships in key markets, including Dallas and Austin. The investment includes building new insights-driven branches, enhancing digital capabilities and hiring additional Premier advisors to serve clients with more complex financial needs.

**About Truist**
Truist Financial Corporation is a purpose-driven financial services company committed to inspiring and building better lives and communities. Headquartered in Charlotte, North Carolina, Truist has leading market share in many of the high-growth markets in the U.S. and offers a wide range of products and services through wholesale and consumer businesses, including consumer and small business banking, commercial and corporate banking, investment banking and capital markets, wealth management, payments, and specialized lending businesses. Truist is a top-10 commercial bank with total assets of $544 billion as of June 30, 2025. Truist Bank, Member FDIC. Learn more at Truist.com.

**About Truist Wealth**
Truist Wealth delivers holistic wealth management solutions to affluent, high, and ultra-high net worth individuals, families, and business owners across the U.S. and abroad. Truist Wealth provides distinct solutions for individuals and businesses through

the following affiliates: Banking products and services, corporate trust, escrow, and institutional investment management services to public, private, and nonprofit organizations provided by Truist Bank, Member FDIC. Securities, brokerage accounts, and/or annuities offered by Truist Investment Services, Inc., member FINRA, SIPC, and a licensed insurance agency. Investment advisory services offered by Truist Advisory Services, Inc. and affiliated SEC registered investment advisers.

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