

Truist introduces team covering middle-market private equity sponsors, family offices

Chris Jackson named head of Institutional Capital Group, complementing large-cap sponsor coverage

CHARLOTTE, N.C., Nov. 17, 2025 /PRNewswire/ -- Truist Financial Corporation (NYSE: TFC) announced the appointment of Chris Jackson as head of its newly established Institutional Capital Group, which will serve middle-market private equity sponsors and select family offices. The new team will increase Truist's coverage in the growing small- and mid-cap private equity market.

Private equity and family office transactions with middle-market companies increased nearly 84 percent over the past decade, and the number of PE firms and family offices has surged¹. Truist's Institutional Capital Group (ICG) will deliver core banking, payments, and capital markets solutions to middle-market sponsors and family offices largely headquartered within Truist's commercial footprint. The dedicated team complements Truist Securities' long-established Financial Sponsors Group, which focuses on large-cap financial sponsors.

Jackson is a seasoned financial professional with more than 20 years of experience in sponsor coverage, capital markets and corporate lending. He joins Truist from Citibank, where he led the Sponsor Coverage Group within Citi's Commercial Bank, building sponsor relationships, driving deal flow and leading a team focused on mid-cap private equity clients.

"Chris's background, product expertise and sponsor coverage experience make him the ideal purpose-driven leader to build our team and take share in this important market," said Jason Cagle, Head of Specialized Industries and Institutional Capital at Truist. "By segmenting institutional capital clients based on their needs, we will strengthen our relevancy and increase our share of wallet."

Jackson will be based in New York City and will lead a team that includes ICG Director Matt Gormly in Dallas and Atlanta-based Vice President Jamie Citrin. Truist will expand the team with senior bankers and resources to support the growing business.

ICG is one of several groups that make up the Specialized Industries and Institutional Capital team, which is part of Truist's [Commercial and Corporate Banking](#) business. TCCB empowers commercial, middle market and corporate clients with industry expertise, flexible lending and deposit solutions, innovative payment products, and advanced capital markets capabilities—helping businesses accelerate growth and achieve their strategic goals.

TCCB is part of the Truist Wholesale Banking segment, which provides comprehensive solutions to commercial, corporate, institutional and wealth clients.

¹ PitchBook 2024 U.S. PE Middle Market Report.

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 Sept. 30, 2025. Truist Bank, Member FDIC. Equal Housing Lender. Learn more at [Truist.com](https://truist.com).

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