



Top Investment Banker at US Capital Global Shares the Secrets of Her Success as a Definitive Dealmaker



We asked Lisa Terk how she defines success, what challenges she faced in her career, and what qualities have contributed the most to her professional success.

At US Capital Global, we are proud to have highly experienced professionals leading our team. We took the opportunity to interview **Lisa Terk**, Senior Vice President. Ms. Terk is a seasoned investment banker with 25 years of experience in Capital Markets and Investment Banking financing businesses in FinTech, CleanTech, Pharma, BioTech, Consumer Retail, Hospitality, Energy, and Natural Resources, among other industries.

Q: What qualities of yours would you say have contributed the most to your professional success?

A: Perseverance, tenacity, an outgoing personality, and knowing a little bit about a lot of things in the capital markets. Clients often have very specific needs, and the flexibility to support or serve mostly any client is immensely helpful. To do this, being a subject-matter expert in a wide array of sectors and financial instruments really helps.

Personally, I've found that my Wall Street family background has also been a great educational asset. I've learned about running public companies since I was a young girl, and have spent many years in San Francisco working for bulge bracket firms. I've had the opportunity to meet and work with many different international and corporate clients at the top brokerage houses and with highly experienced business partners.



Q: What advice do you normally give to the junior talent you mentor?

A: Learn one task exceptionally well and then move on to the next. Always be confident and proactive. Undertake all tasks with a focused level of personalization and attention to detail, even in areas that may appear minor, such as scheduling a call. White glove service is essential, especially in private equity, to stand out. No task is too great or too small.

Q: As a seasoned professional with 25 years of financial services experience, what are some of the main challenges you have experienced during your career, if any?

A: The cyclical market changes. Adapting to these cycles in financial services means anticipating what lies ahead and paying attention to market movements and investor appetite that is tightly linked to these waves. For instance, a new Wealth Management client had all their money tied up in tech mutual funds, which was very overweighted, back in 2003. We worked together to diversify their portfolio into blue-chip stock holdings and aggressive commodities baskets, so they could catch the market movements or upswing with a properly balanced portfolio. Never toss your eggs in one basket. I apply this method to building my investment banking client base, too!

Q: What inspires you the most at this time in your life?

A: I'm passionate about building companies and helping them to move to the "next level" of success. This is what drives me in investment banking, and I love a challenge. I seek out visionaries: executives who are disruptive innovators. I want to finance companies that are going to make a big difference in their sector specialization or create job growth. Cybersecurity, FoodTech, and CleanTech are currently strong sectors, representing the new global wave of the future. I look for more complex deals that stand out, that are appealing to sophisticated investors, that we would be proud to promote as a firm and have a positive impact on the environment.

Q: How do you define a good leader?

A: Great leaders support everyone around them and are helpful at every level. They make tasks easier and more streamlined, ensuring that everyone has the tools they need to execute their responsibilities quite well. Great leaders participate and should be able to wear a lot of hats, and have both individual goals and greater goals for their firm or "big picture thinking." Showing courage in the face of adversity and seeking equitable solutions are important leadership skills across the board; at this time, I'm also focusing on bringing in partnerships for the firm.

Good leaders maintain their focus and set the bar high, even in the midst of challenges, to adopt a level-



headed approach in reaching their goals. After all, in investment banking we're not paper pushers; we're problem-solvers helping to achieve a common goal with every client to build their company as well as showcase the opportunity.

Q: What is your definition of success?

A: Success means finding purpose and fulfillment in what you are doing and where you are going. It means seeing a clear pathway forward and adding some of your own creativity along the way too. There is always room to put your individual stamp on what you do and make it your own.

Q: What one piece of advice would you give any aspiring female business and industry leaders reading this?

A: Don't let anyone tell you that you can't do something. Set your goals high and go for it. This applies to everyone, but women in financial services face greater challenges. Personally, I often ignore or correct false assumptions and stereotypes in the industry through humor. Ultimately, we thrive by surrounding ourselves with people who inspire us and bring out the best in us.

Q: Where are you looking to go with your career in the next 5-10 years?

A: I look forward to closing many more deals and becoming a partner at US Capital Global. I would be very interested in managing one of our international hubs, perhaps in Canada or France. San Francisco has been my home for a long time, but I think I could contribute even more by implementing our brand abroad, down the road, and put my language skills to use. I would love to work in a bigger city, and grow with the company. It's great to be known as "The Terkinator" here in San Francisco or "The Closer" among my colleagues and clients; it makes me smile knowing they feel they can count on me.

To learn more about US Capital Global, email Lisa Terk, Senior Vice President, at lterk@uscapglobal.com or call +1 415-889-1026.