



ALM First Promotes Sherwin to Principal, Adds New Role for Haley

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Contact: Sharon Simpson, (240) 620-4095 or sgsimpsonconsulting@mac.com

Dallas, Texas – ALM First recently promoted Ryan Sherwin to Principal and named current Chief Investment Officer, Jason Haley, President of ALM First Financial Advisors, LLC, the firm's SEC-registered investment adviser (RIA) subsidiary.

Sherwin joined the firm in 2014 and has over fifteen years of industry experience. He is well known for actively consulting with clients on their most pressing issues and customizing impactful solutions. He will continue to oversee the firm's sales team in this new role.

"We're thrilled to announce Ryan's promotion and look forward to his continued contributions," says Mike Ensweiler, Principal. "His unique industry experience and insights consistently push ALM First forward, finding new ways to put our clients' best interests first and deliver more value for their key stakeholders."

Haley joined ALM First in 2008 and was promoted to Chief Investment Officer in 2020. In this additional role as President of ALM First's RIA, he will continue to lead the Investment Management Group, which is responsible for investment theme development and portfolio management services for the firm.

"Jason's strong financial knowledge, dedication and professionalism benefit our clients immensely," says Emily Hollis, CFA and CEO of ALM First. "We're proud of his accomplishments to date and look forward to the expansion of his vital role at the firm."

About ALM First

ALM First was founded in 1995 as a strategic partner for depositories, offering an array of financial advisory services. The firm's expertise in asset liability management, investment management, balance sheet strategy, secondary market solutions, and specialty financial services, has allowed it to deliver deeper insights into financial institutions' balance sheets, strengthening their performance and building efficiencies. With over \$77 billion of investments under management (as of November 30, 2025), ALM



First Financial Advisors is an SEC-registered investment advisor, acting as an unbiased third party, offering commission-free, fee-based services to over 300 financial institutions across the country.

In recent years, ALM First Group has expanded to include several wholly-owned subsidiaries including DDJ Myers, an ALM First Company and ALM First Executive Benefits, LLC. Driven by client needs, the firm now offers various services to help financial institutions optimize their greatest assets – their people.

“ALM First” is a brand name for a financial services business conducted by ALM First Group, LLC (“ALM First”) through its wholly owned subsidiaries: ALM First Financial Advisors, LLC (“ALM First Financial Advisors”); ALM First Advisors, LLC (“ALM First Advisors”); and ALM First Analytics, LLC (“ALM First Analytics”). Investment advisory services are offered through ALM First Financial Advisors, an SEC registered investment adviser. Access to ALM First Financial Advisors is only available to clients pursuant to an Investment Advisory Agreement and acceptance of ALM First Financial Advisors’ Brochure.

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