

USCAPITAL



LISA GRACE TERK

SPEAKING ENGAGEMENTS AND PUBLICATIONS

US Capital Global

1 Ferry Building, Suite 201
San Francisco, CA 94111

+1 415 215 6150
lterk@uscapital.com

WWW.USCAPITAL.COM



LISA GRACE TERK IN THE MEDIA

LISA GRACE TERK SENIOR VICE PRESIDENT



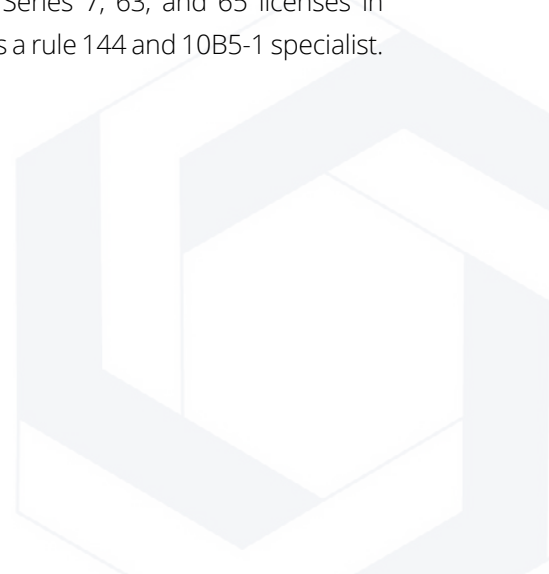
Lisa Grace Terk is a Senior Vice President at US Capital Global specializing in private equity and private debt. Ms. Terk comes to US Capital Global with 25 years of Financial Services experience in wealth management, investment banking, and capital markets.

In April 2026, ACG Magazine recognized Ms. Terk as one of four investment bankers to know, featuring her in “2026 M&A Business Development Professionals to Watch.”

Ms. Terk began her career as a Financial Advisor for Morgan Stanley Wealth Management and has since occupied a variety of financing and advisory roles, which have enriched her reputation for both recognizing undervalued companies and bringing transactions to a successful finish. Experienced in sourcing timely opportunities across various market sectors, Ms. Terk has advised both private and public companies and served many Fortune 500 clients. She specializes in cash management and financing for Fintech, Cleantech, Pharma, Biotech, Consumer Retail, Hospitality, Energy & Natural Resources sectors.

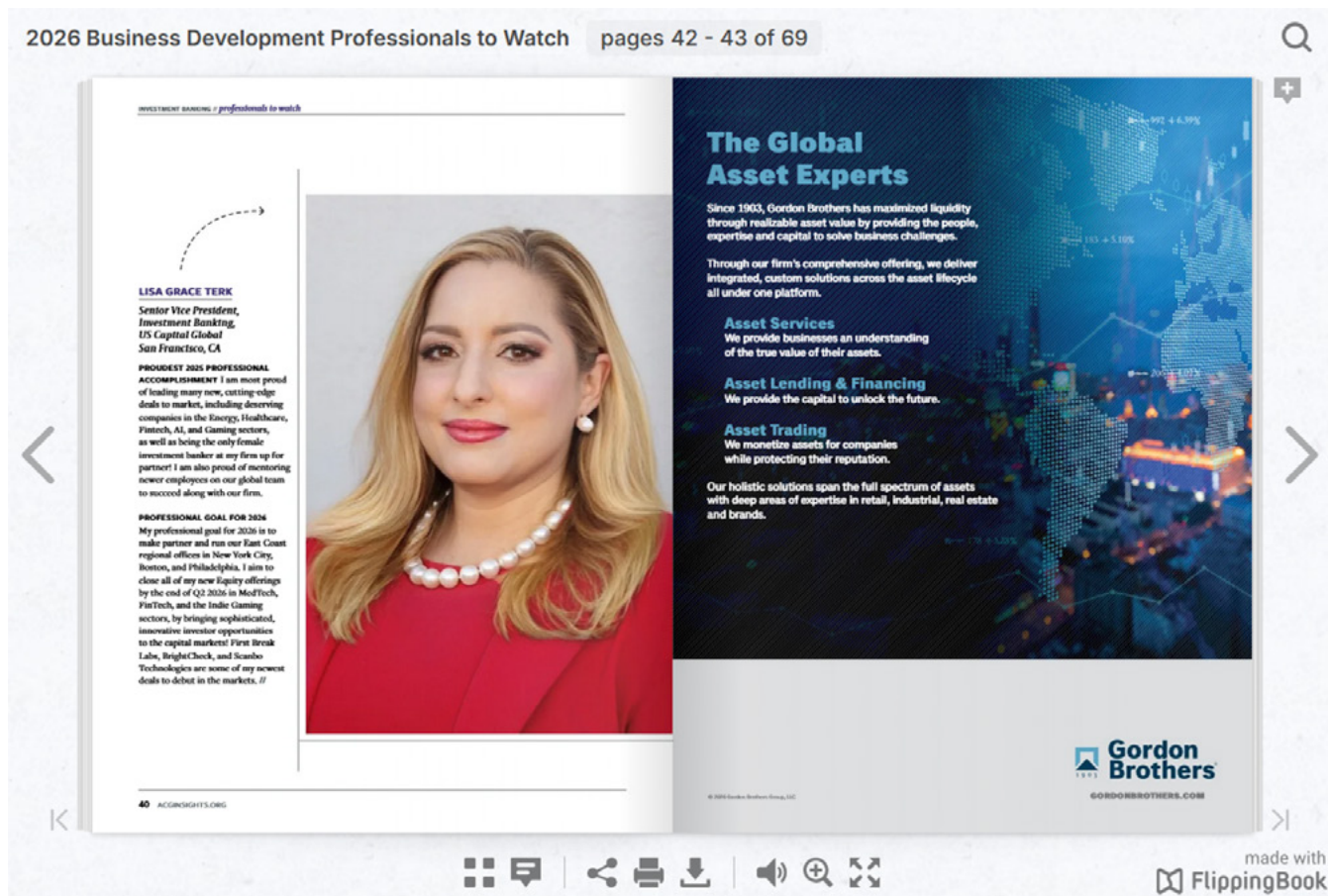
Prior to joining US Capital Global, Ms. Terk specialized in Corporate Executive Stock Plans for the Wealth Management division at Oppenheimer & Co. and acted as Special Advisor to the premier investment banks WR Hambrecht in San Francisco and Ardour Capital Management in New York.

Ms. Terk has been active in charitable fund raising for notable causes in the Bay Area such as the NFL Alumni Association & the Haight Ashbury Free Clinics. She received her bachelor’s degree with honors from McGill University and is fluent in French. Ms. Terk maintains Series 7, 63, and 65 licenses in good standing, and is a rule 144 and 10B5-1 specialist.



ARTICLES, INTERVIEWS, AND PRESS RELEASES

2026 Business Development Professionals to Watch pages 42 - 43 of 69



The screenshot shows a digital magazine page with two main sections. On the left, there is a profile for Lisa Grace Terk, a Senior Vice President at US Capital Global. Her bio includes her role, a list of industries she works in (Energy, Healthcare, Fintech, AI, and Gaming), and her professional goals for 2026. On the right, there is a large advertisement for Gordon Brothers, titled 'The Global Asset Experts'. The ad lists services such as Asset Services, Asset Lending & Financing, and Asset Trading, and mentions their holistic solutions across various asset classes. The page is part of a digital flipbook, as indicated by the navigation arrows and the 'made with FlippingBook' logo at the bottom right.

INVESTMENT BANKING / professionals to watch

LISA GRACE TERK
Senior Vice President,
Investment Banking,
US Capital Global
San Francisco, CA

PROUDEST 2025 PROFESSIONAL ACCOMPLISHMENT I am most proud of leading many new, cutting-edge deals to market, including deserving companies in the Energy, Healthcare, Fintech, AI, and Gaming sectors, as well as being the only female investment banker at my firm up for partner! I am also proud of mentoring newer employees on our global team to succeed along with our firm.

PROFESSIONAL GOAL FOR 2026 My professional goal for 2026 is to make partner and run our East Coast regional offices in New York City, Boston, and Philadelphia. I aim to close all of my new liquidity offerings by the end of Q2 2026 in MedTech, FinTech, and the Indie Gaming sectors, by bringing sophisticated, innovative investor opportunities to the capital market. First Break Labs, BrightCheck, and Scando Technologies are some of my newest deals to debut in the markets. //

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Through our firm's comprehensive offering, we deliver integrated, custom solutions across the asset lifecycle all under one platform.

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We provide businesses an understanding of the true value of their assets.

Asset Lending & Financing
We provide the capital to unlock the future.

Asset Trading
We monetize assets for companies while protecting their reputation.

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“Investment Banking Professionals to Watch: Four investment bankers you need to know in 2026”

ACG Magazine (2026 M&A Business Development Professionals to Watch) – Spring 2026, p. 40.

<https://online.flippingbook.com/view/749264304/42/>

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

US Capital Global – June 2025

<https://uscapital.com/news/pdfs/top-investment-banker-at-us-capital-shares-the-secrets-of-her-success-as-a-definitive-dealmaker.pdf>

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IN THE MEDIA

US Capital has been quoted and featured in leading publications including:



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