

---

## Marketplace Team Bios



---

### Clarke Roberts

SVP & General Manager

Clarke is SVP and General Manager of the Marketplace at Happen Bank, where he oversees the team, revenue, and products that account for the majority of loan funding.

He directly leads capital markets, sales, marketing, and operations. He also partners with credit, product, engineering, and legal to shape what the bank offers to borrowers and investors.

Clarke brings over 25 years of experience as an entrepreneur and executive in financial services. He joined the company in 2017 to lead its transition from retail to institutional funding and stepped into the General Manager role in 2023. Earlier in his career, he co-founded Pico Quantitative Trading (now Pico.net), founded EAX Trading, and held global roles at Charles Schwab Capital Markets, Nasdaq, and Merrill Lynch Global Markets.

Clarke is a voting member of Happen Bank's Asset-Liability and Valuation Committees and holds a BA in Economics from the University of Virginia.



---

### Jason Hsiao

VP of Institutional Sales

Jason is the VP of Institutional Sales at Happen Bank, where he is responsible for marketplace partnerships and coverage of asset managers.

Prior to joining the company, he held positions in credit structuring, debt trading, and portfolio management at Lehman Brothers, Barclays, and Bank of Tokyo.

Jason holds a BSE in Operations Research from Cornell University and an MBA from the University of Chicago Booth School of Business and is a CFA Charterholder.



---

## John Steward

VP of Institutional Sales

John is the VP of Institutional Sales at Happen Bank, where he and his team cover the asset manager channel, selling whole loan and securitized products to firms active in consumer and structured credit.

During his tenure, he has personally driven more than \$24B in platform sales and led relationships with leading names in asset management. Prior to joining the company, he spent a decade in commercial real estate sales and financing in both brokerage and banking roles.

John holds a BA in Liberal Arts with a concentration in Economics from San Francisco State University.



---

## Ari Schlusberg

Senior Advisor, Financial  
Institutions

Ari is Senior Advisor for FIG Partnership and Sales at Happen Bank, focused on bank and credit union sales.

He brings an extensive background in financial institution sales and relationship management. Ari joined the company after nearly 11 years with StoneCastle, a leading provider of cash management solutions that has supplied more than \$20B in direct capital and deposits to US banks. There, as Executive Vice President, he led the sales and relationship management organization, overseeing more than 800 bank relationships.

Ari serves on the board of directors of several community nonprofit organizations and holds a BA from Yeshiva University.



---

## **Lealanie Roberts**

Senior Director and Head  
of Capital Markets

Lealanie is Senior Director and Head of Capital Markets at Happen Bank.

In her role, she designs, launches, and scales capital markets solutions and other financing programs that support a vibrant marketplace.

She brings more than two decades of capital markets and treasury experience spanning debt structuring, acquisition financing, and liquidity management, with a consistent focus on controls and governance. Most recently, she was the lead member of Credit Suisse's global long-term debt program within its Capital Markets and Treasury function, where she managed the execution of \$26B in senior unsecured debt and Additional Tier 1 capital in 2022. She has also held capital markets positions at Citi, CIT, and Rabobank.

Lealanie holds a BSE in Economics from Fordham University.