



Union Square Advisors Strengthens Software Expertise with Managing Director Hire Terry Jackson

Jackson brings 18+ years of software investment banking experience and further augments the firm's significant hiring of senior bankers in 2024

NEW YORK & SAN FRANCISCO, November 12, 2024 - [Union Square Advisors](#), a technology-focused investment bank, today announced that Terry Jackson has joined the firm as a Managing Director. In his role, Jackson will lead the firm's coverage of the broad vertical market software space, with an additional focus on software companies operating in the payments, office of the CFO and supply chain management areas.

Over the course of his career, Jackson has led engagements across a wide range of enterprise software subsectors relating to both horizontal and vertical applications, as well as in the infrastructure software, enterprise data management and cybersecurity segments. Jackson's hiring further bolsters the firm's strong existing capabilities and depth of knowledge across the broad enterprise software space.

"Organizations that operate in large vertical markets are increasingly turning to specialist software providers for their mission-critical applications, rather than continuing to rely on more generalized, one-size-fits-all vendors," said Ted Smith, the firm's President and Co-founder. "With our strong momentum of completed transactions in a number of key verticals, including health tech, construction tech, GRC, fintech, defense tech and others, this is the perfect time for us to expand our team with a senior banker of Terry's exceptional caliber, domain knowledge and transaction experience."

"I am thrilled to join the USA team and help further establish and expand the firm's unique advisory capabilities," added Jackson. "I look forward to collaborating with the firm's leaders and finding additional ways to serve our clients' needs in the broad software space."

"Terry's hiring caps off a tremendous year of growth for our senior industry coverage and capital markets teams," added Michael Meyer, Union Square Advisors' CEO and Head of Capital Markets. "With Terry on board, we have again significantly expanded both our coverage footprint and transaction execution expertise."

Jackson joins the firm's other 2024 senior hires including: Christopher Appaneal, Managing Director, focusing on governance, risk and compliance (GRC) and back-office software; Jon Shalowitz, Managing Director, concentrating on infrastructure, data and AI software; Todd Meadow, Managing Director, leading the firm's sponsor coverage and GP/LP liquidity solutions practice; and Anderson Wasden, Director, specializing in debt and equity capital markets execution.

Jackson comes to Union Square Advisors with nearly 20 years of experience in advising public and private companies and financial sponsors on a wide range of M&A, equity and debt financing transactions, exceeding \$100 billion in value. Prior to joining USA, he was a senior member of the global software investment banking teams at J.P. Morgan and BofA Securities, and of the M&A group at BMO Capital Markets. Jackson received his MBA with honors from the Wharton School and a dual bachelor's/master's degree in Accounting from BYU, where he graduated magna cum laude and with distinction, respectively. Terry also is a CFA charterholder and a Certified Public Accountant (inactive).

About Union Square Advisors

Union Square Advisors is a leading technology-focused investment bank that offers strategic mergers & acquisitions advice and execution, agented private capital financing and debt capital markets advisory services. Founded in 2007, with offices in San Francisco and New York, Union Square Advisors works with leading public and private technology companies, private equity, venture capital and family offices. Our expertise spans many aspects of the technology landscape, including Enterprise Software and Infrastructure, FinTech, HealthTech, Internet+Digital Media, eCommerce, Consumer Software, AIoT & Industrial Technology, GRC, Back-Office Software and other key segments. Since inception, Union Square Advisors has advised on more than 185 strategic and financing transactions, valued in excess of \$120B. For more information, please visit <http://www.usadvisors.com>. Member FINRA and SIPC.

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