

ANCORA

PROFESSIONAL PROFILE

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JAMES M. BERNARD, CFA

SENIOR VICE PRESIDENT, DIRECTOR OF FIXED INCOME

Mr. Bernard is the senior portfolio manager for the fixed income management and consulting group of Ancora Advisors. Mr. Bernard manages taxable and tax-exempt fixed income portfolios for various institutional and high net individual accounts. Besides portfolio management, he provides fixed income consulting services for various financial institutions.

Mr. Bernard managed fixed income portfolios as well as the Ohio Municipal Bond Fund and the Kentucky Municipal Common Trust Fund for Fifth Third Investment Advisors prior to joining Ancora Advisors. He also was associated with Maxus Investment Group and Gelfand Partners. His prior experience included serving as Chief Investment Officer and Treasurer of a multi-line insurance organization in central Ohio. Mr. Bernard also managed funds for banks and trust companies in Indiana and Kansas City during his 30 years in the investment business.

Mr. Bernard earned a Bachelor degree in Business Administration from Xavier University and his MBA from Ball State University. He is a member of the CFA Institute and the Cleveland Society of Financial Analysts. Mr. Bernard is a registered rep holding Series 7 and Series 24 (principal) licenses.