

ANCORA

PROFESSIONAL PROFILE

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TRAVIS CLASSEN

NEW ACCOUNTS & ACCOUNT SERVICES

TRAVIS CLASSEN manages Ancora's new accounts and client services desk. He assists retail customers through the account transfer process and provides valuable support to money managers and registered representatives as assets arrive. Mr. Classen is also responsible for assuring customer transfers occur in total, including the cost basis paid for the securities. He also facilitates clients services such as periodic distributions, checking, or online access. Additional duties include, processing day to day business in customer accounts, depositing funds, IRA Rollovers, wire requests, and other special transactions. Mr. Classen works closely with Ancora Securities clearing entities to solve problems if they arise and is also responsible for taking action on the high priority intraday and overnight messaging from our clearing firm, Pershing LLC.

Mr. Classen also assists clients and relationship managers with special transactions, including purchasing units of limited partnerships, exercising stock options, or working with stock certificates. He also provides trade assistance when required.

Mr. Classen is a graduate of Loyola University with a Bachelor degree in Business Administration with a concentration in Finance. He is a FINRA Series 7 licensed representative,