

ANCORA

PROFESSIONAL PROFILE

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ONE CHAGRIN HIGHLANDS
2000 AUBURN DRIVE, SUITE 300
CLEVELAND, OH 44122

V 216 825 4000

F 216 825 4001



JOSEPH SPIDALIERI

HEAD TRADER & PORTFOLIO ACCOUNTANT

JOSEPH SPIDALIERI manages Ancora's trade desk and provides execution phone support for dozens of Ancora Institutional clients. Mr. Spidalieri's primary responsibilities are placing stock and bond orders utilizing the infrastructure and liquidity of Pershing Trading Company and other ECN's. Mr. Spidalieri is also responsible for settling trades activity done away from the firm, and allocating execute shares across customer accounts.

Mr. Spidalieri also centrally administers Ancora's portfolio accounting system and client reporting engine. Using Advent's enterprise software product, Axys, Mr. Spidalieri generates informative and specialized equity and fixed income reports for money managers and their retail customers. These reports contain account performance evaluations against key benchmarks, as well as other expert analysis. Mr. Spidalieri assists retail customers as well throughout the year with tax lot accounting and capital gain reporting.

Prior to joining Ancora Securities, Mr. Spidalieri served 2 years at the American Express Company's finance and money management division. Here his job involved interaction with key clients and institutional customers and assisting portfolio managers with customer presentations.

Mr. Spidalieri is a graduate of Miami University with a degree in Business Finance.