



Anchor Capital Advisors Elevates Diane DeBono Schafer to COO and Jennifer DeSisto to Sole CIO

The Firm Also Expands Investment Management Team with Addition of Financial Analyst Neeraj Mahajan

Boston, MA – April 22, 2020 – [Anchor Capital Advisors, LLC](#) (“Anchor”), a value-oriented investment management firm, announced the promotion of two executives. Diane DeBono Schafer was elevated to chief operating officer (COO) and Jennifer K. DeSisto, CFA®, CAIA® was promoted to sole chief investment officer (CIO). Additionally, the firm added analyst Neeraj Mahajan, CFA®, to its investment management team.

“At Anchor Capital, we have stayed true to our value-oriented investing approach and are excited to add resources and talent that can help us to continue to provide consistent performance while controlling risk,” said **Bill Rice, Jr., Anchor Capital CEO**. “Diane and Jen have distinguished themselves with their outsized contributions to the firm, and I am excited to lead the firm with them as members of Anchor’s management committee. I have known Neeraj professionally for more than a decade and am thrilled to have him joining our team, as his philosophy and investment process fit seamlessly with Anchor’s. These moves all serve to further enhance our position in the value investing space.”

Below are the details of Anchor’s promotions and team additions:

- **[Diane DeBono Schafer](#)**: In addition to her new role as COO, Diane will continue to serve in her existing role as Anchor’s chief compliance officer (CCO). As both COO and CCO, Diane will oversee the firm’s operations, trading, compliance, administration, and technology. Diane has over 25 years of managerial experience with an established track record in strategic planning, budgeting, productivity improvement, technology, and business alignment, resource planning, and product training. She previously worked at Trillium Asset Management as director of operations, where she developed and implemented strategies to promote efficient and streamlined operations.
- **[Jennifer K. DeSisto](#)**: As CIO, Jennifer oversees the investment team consisting of 9 portfolio managers and analysts. Jennifer will also continue to lead the All Cap Value and Balanced Value portfolios, two of Anchor’s legacy strategies, as portfolio manager. Jennifer’s background includes structuring leveraged buyouts, working out distressed debt, fundamental and quantitative portfolio management, and results-oriented business management. She previously worked at Fiduciary Trust Company as a portfolio manager, where she worked closely with the CEO to develop the strategic direction of the firm, including rebuilding the investment team and process.
- **[Neeraj Mahajan](#)**: As Anchor’s newest financial analyst, Neeraj will be responsible for equity research for the All Cap Value and Balanced Value strategies. With more than 15 years of experience in financial services, technology, and consulting, Neeraj has honed his skill set - combining in-depth, bottom-up fundamental research, with a strong and varied background in technology. Neeraj previously worked with Rapid7 as head of investor relations, and at Grantham Mayo Van Otterloo & Co LLC as an analyst, where he helped manage GMO Quality Fund and GMO Climate Change fund.

“Having been a part of the Anchor community for almost four years, I have observed the firm’s natural ability to meet client expectations, while providing its employees with the platform to grow their individual practice and prowess,” said **Jennifer K. DeSisto, CFA®, CAIA®, Anchor Capital CIO**. “I am grateful for this wonderful opportunity to lead this team, and I look forward to working towards Anchor’s collective mission of serving client interests with distinguished value investing strategies.”

Anchor’s investment team, most of whom are shareholders in the company, remain committed to managing value-oriented investment strategies, which include five core legacy strategies and three



specialty strategies: Dividend Income Value, Founders Value, and Value Opportunities. Anchor's breadth of value strategies offers a wide array of solutions for both individual and institutional investors.

For more information on Anchor Capital Advisors, please visit www.anchorcapital.com.

About Anchor Capital Advisors, LLC

Founded in 1983, value-oriented investment management firm Anchor Capital Advisors always approaches its products—and its relationships—from the bottom up. For more information about Anchor, or to learn about their strategies for managed accounts, private clients, or institutional investors, please visit www.anchorcapital.com.

Media Contact

Kathleen Hopkins

FiComm Partners

anchorcapital@ficommpartners.com