

# THE ANCHOR

## Bancroft Capital's Quarterly Newsletter

THIRD QUARTER 2021

OCTOBER 15, 2021

### BANCROFT CAPITAL RECOGNIZED AS A 2021 PHILADELPHIA 100® HONOREE

Bancroft Capital is humbled and excited to be named a 2021 Philadelphia 100® Honoree. The hallmark of entrepreneurial achievement in the region, Philadelphia 100® identifies and honors the 100 fastest growing, privately held companies in the Greater Philadelphia Region. [Read more.](#)

The Philadelphia100® is a merit-based program. Only companies that are among the fastest growing, privately held companies are awarded the Philadelphia100® designation. The integrity of the process and the resulting list makes the Philadelphia100® one of the most sought after awards in the region. Started in 1988 by The Entrepreneurs' Forum of Greater Philadelphia and the Wharton SBDC, the Philadelphia100® has recognized some of the region's finest companies when they were just beginning to emerge: Mothers' Work, Fiberlink, Urban Outfitters, Forman Mills, Kremer Laser Eye Center, and Primavera Systems – and in 2021, Bancroft Capital.



### BANCROFT CAPITAL ANNOUNCES NEW PARTNERSHIPS

We are proud to announce partnerships with State Street Global Advisors and BlackRock to further diversify our treasury and liquidity solutions. Our aim is to help counterparties solve the challenging puzzle of improving their D&I reporting while preserving principal in a world where it seems like everyone is holding record cash reserves. The new offerings bring to market seven funds (5 SSGA, 2 BLK) across a spectrum of AAA MoneyMarkets including ESG Prime Funds.



"This is a natural progression of our Cash Management business," said Director of Cash Management Michael J. Spatacco. "Our client feedback centered on combining D&I initiatives with increased investment options, and we believe these partnerships help us to meet those needs."

### BANCROFT CAPITAL ANNOUNCES DISABLED VETERAN TRAINING PROGRAM ADVANCEMENT AND ACTIVATION FOR 2021 CANDIDATES

Former VTP Candidate Captain James Leaghty, USMC, will transition to career opportunities on the buy-side of institutional financial services. While participating as a Candidate in the VTP for less than a year – the knowledge and skill sets he developed have proven invaluable. He leaves Bancroft with the Series 7, 52, 63, 65, and 79 – in addition to the CFA Level 1 candidate.

Bancroft simultaneously announced the activation in the VTP of disabled-veteran Sergeant Ahmad Smith, USMC. Ahmad's activation in the VTP had been pending his honorable discharge from active military duty. Ahmad will now receive educational support and training as he embarks on his career in the institutional finance industry. Ahmad, who lives in Orange County, CA, will train out of Bancroft's Southern California office where he will work toward the completion of the VTP-sponsored FINRA program and obtain his brokerage licensing required for a career in institutional financial services. [Read the full release.](#)



### 3RD QUARTER CO-MANAGED TRANSACTIONS

