

## **Alicia Carbone**

Senior Operations Specialist



**Alicia Carbone**, Senior Operations Specialist, handles corporate actions processing, institutional and wrap account administration, and client service. She also provides support for trading, sales, and portfolio management. Alicia joined the firm in 2007, and worked in marketing and operations until she was promoted to her current position in 2012. Alicia received a BA in Psychology with a minor in Mathematics and Women's Studies from State University of New York, Albany.

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The firm invests in high quality stocks with strong balance sheets, governance, and fundamentals, as well as the ability to pay and willingness to increase dividends. Our portfolios invest in infrastructure, essential services, and MLPs (Master Limited Partnerships), as well as diversified portfolios that invest across all sectors. We continue to integrate ESG analysis with financial analysis in our pursuit of companies that have strong commitments to high operational standards, the environment, social responsibility, and good corporate governance. We call this approach *Sustainable Income Opportunities*<sup>™</sup>—investment solutions to match our clients' goals and values.