



LEONARD D. BOCLAIR

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Len Bocclair is a tax manager in BBD's Investment Management Group dedicated exclusively to the service of investment companies.

Len has dedicated his 30-year career in the investment management industry to the tax, accounting, and financial reporting needs of investment companies.

Prior to joining BBD, Len was a mutual fund tax manager with Lincoln Financial Group.

At Lincoln Financial Group, Len managed the tax services and tax work cycle for the Organization's 90 proprietary regulated investment companies, including both equity and fixed income funds and funds with derivatives of varying complexity. Len's responsibilities for the funds included:

- Tax return filing
- Tax provisions
- Establishment of tax policies related to tax adjustment calculations and fund dividend payments
- Compliance with Sub Chapter M rules
- Tax treatment of potential new investments in the funds

Len's experience also includes more than 15 years with BNY Mellon Asset Servicing and its predecessor, PNC Global Investment Servicing, where he served in both tax management and fund accounting management roles.

Because of Len's extensive experience in both the tax services and fund accounting arenas, he offers unique perspective on the tax challenges facing our clients. This complementary experience adds significant value to the tax services offered to BBD's clients.

He is a graduate of Lycoming College, where he earned a Bachelor of Arts degree with a major in accounting.

The Investment Management Group at BBD provides audit and tax services for registered and unregistered investment companies, investment advisors and securities broker-dealers. Our affiliate, BBD Cayman, provides services for offshore funds based in the Cayman Islands. For more information, visit bbdcpa.com.