



Erik M. Herzfeld

President and Portfolio Manager
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Erik Herzfeld is responsible for the trading and portfolio management activities of Thomas J. Herzfeld Advisors, Inc., an investment management firm specializing in closed-end fund research, analysis, and investment since 1984.

Mr. Herzfeld is co-portfolio manager of The Herzfeld Caribbean Basin Fund, the first closed-end fund to invest in the Caribbean region (NASDAQ: CUBA). Since 2012, Mr. Herzfeld also serves as co-portfolio manager of the Virtus Herzfeld Fund, an open-end mutual fund subadvised by Herzfeld Advisors for Virtus Investment Partners.

Mr. Herzfeld has over a decade of Wall Street experience in the equity and currency derivatives markets. Prior to joining Herzfeld Advisors in 2007, he held quantitative research and trading roles at both Lehman Brothers and JPMorgan, where he served as a vice president based in New York and Asia.

Mr. Herzfeld earned a B.A. in economics, with a concentration in mathematics, from Johns Hopkins University and an S.M. (M.B.A.) in financial engineering from MIT Sloan School of Management. He began his career in the investment industry in 1998.

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