

Portfolio Managers – Balanced Value



Colin Glinsman
Managing Director

Mr. Glinsman is lead manager of Oppenheimer Capital's Large Cap Value strategy. Mr. Glinsman also manages an open-end mutual fund managed in the balanced style for a third-party distributor. He joined Oppenheimer Capital in 1989 and brings over 25 years of investment experience to his current position. From 1984 to 1989 Mr. Glinsman provided merger advice to clients, first with Morgan Grenfell and later with Prudential Securities. From 1980 to 1984 he worked with Coopers & Lybrand, during which time he received the CPA designation. Mr. Glinsman earned a BA in Economics from Yale University and an MS in Accounting from New York University.



Gerald E. Thunelius
Senior Vice President

Mr. Thunelius is Director of Fixed Income Management at Oppenheimer Capital and a portfolio manager/analyst in the firm's fixed income group. Prior to joining the firm in 2007, he was Chief Investment Officer of Gartmore Morley Financial. He also led the taxable fixed income group at The Dreyfus Corporation where he managed the full spectrum of fixed income disciplines. Mr. Thunelius has a BBA in Finance from Dowling College, and 19 years of broad investment experience including fixed income portfolio management, trading, and risk management.