William H. Bergner, CFA – over 40 years of portfolio management experience.

William Bergner joined Brookfield Investment Partners, LLC in January 2002. Bill is the Chief Investment Strategist of the firm. He develops the macro-economic outlook and highlights the key investment themes that provide the framework for designing client investment portfolios.

Bill has spent his entire career in institutional investment portfolio management with a specialization in fixed income markets. Prior to his retirement from Firstar Corporation (now U.S. Bancorp), he was Senior Vice President and Chief Investment Officer. His responsibility included all corporate investment portfolio assets totaling $8.5 billion. He directed Firstar's fixed income policy, strategy, asset allocation, portfolio management, credit research and trading. He served on the Asset/Liability Committee and provided economic and interest rate forecasts and analysis. During his tenure at Firstar, he completely reorganized the investment portfolio management process into a unified company-wide model. Bill managed the transfer of Firstar's entire investment management operation from Wisconsin to free-standing subsidiaries in Nevada.

Bill began his investment career under the experienced and respected leadership of the Investment Division of NN Corporation (formerly Northwestern National Insurance Company) in Milwaukee where he became Vice President and Assistant Treasurer. Here, he managed fixed income portfolios for NN's property/casualty and life insurance companies while also heading up its investment accounting operations. Subsequently, Bill was one of nine principals of NN's Investment Division who founded National Investment Services of America, an investment counseling firm. NISA managed investment portfolios for pension and profit-sharing funds, foundations, insurance companies and individuals. Bill managed taxable and tax-free fixed income accounts for those entities and held responsibility for the firm's immunized bond portfolios and the credit research function.

Bill was granted a CFA charter 1977, and he is a member of the CFA Society of Phoenix. He received a BBA and MBA from the University of Wisconsin-Milwaukee in Finance. Bill is based in Scottsdale, Arizona and was born in 1944.