



Joe Bergner

Managing Director

Securities & Guaranteed Loan Markets



Since 1987, as a licensed securities broker, my primary focus has been on assisting institutional investors with their investment needs. I believe it is imperative for a broker to be knowledgeable of all investment vehicles available in today's expanding financial markets.

Being of service to my clients is knowing explicitly what their investment parameters are and then finding the investment that matches price, yield and suitability in regard to risk. I have found the two key factors to building long-term relationships with my clients to be service and trust.

Business/Education Background

1996 – Present
1991 – 1995
1989 – 1991
1987 – 1989
1982 – 1986

Coastal Securities, Inc.
Texas Capital Securities, SOES Trader
Lehman Brothers, Account Executive
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