



**William R. Berger,
CFA, CPA**

Senior Vice President and
Senior Relationship Officer

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Professional:

- Senior Vice President and Senior Relationship Officer, Sentinel Trust Company (2004–present) – *Responsible for leading selected client relationships and ensuring consistency of investment planning and reporting across the firm*
- Senior Portfolio Manager/Principal, Vaughan, Nelson Scarborough & McCullough, LP (1998–2004) – *Leader of Large-Cap Core equity team responsible for more than \$1 billion in assets and member of Growth equity team; responsible for key client relationships in U.S. and Europe*
- Vice President and Portfolio Manager, Securities Management & Research, Inc. (1993–1998) – *Managed the SM&R Balanced Fund; co-managed the SM&R Income and Growth Funds; member of the finance committee of American National Insurance Company, responsible for all equity, fixed income, real-estate and private equity decisions for \$6 billion in assets*
- Portfolio Manager, Trinity Investment Management Corporation (1989–1993) – *Managed discretionary accounts for corporate, university, religious and public funds*
- Senior and Staff Auditor, Coopers & Lybrand (1985–1987)

Certification:

- Chartered Financial Analyst (1992)
- Certified Public Accountant, Texas (1989)

Professional Organizations:

- CFA Institute
- CFA Society of Houston
- Texas Society of CPAs
- Houston Society of CPAs
- Houston Business and Estate Planning Council
- Houston Estate and Financial Forum

Education:

- Miami University, BS in Accounting and Finance (1985)
- University of Pennsylvania, The Wharton School, MBA (1988)

Community Involvement:

- Skills for Living, *volunteer career mentor for at-risk youth*



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