



Richard S. Berg

Chief Executive Officer, Co-Founder

Rich is CEO and co-founder of Performance Trust Capital Partners, LLC. Performance Trust trades and invests over \$25 billion annually in fixed-income securities primarily for middle market institutions. Prior to this, he was a Managing Director with Clayton Brown & Associates, Inc. where he directed the Portfolio Analytics Group, a division of the company dedicated to providing and executing commercial bank client investment and funding strategies. Rich was a Contributing Editor for the *ABA Banking Journal* for five years and authored various feature articles in this and other banking and regulatory publications. He is a featured speaker at numerous banking, insurance and professional conferences and seminars. Rich was also one of the original faculty members of the highly acclaimed Principles of Performance™ course (formerly known as Bond Math University®) and The Advanced Course®. He is a frequent guest on CNBC, Bloomberg TV & Radio, MSNBC, Fox Business News, WLS, WTTW and Reuters.

Rich received his BS in Mathematics from Wheaton College and an MBA from Northwestern University's Kellogg Graduate School of Management.

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Partial List of Speaking Engagements

Performance Trust has been leading and educating investment professionals since the company's inception over 20 years ago. Performance Trust educational programs have been sponsored by numerous private organizations, banking associations and banking schools. The curriculum has also been taught to various government institutions.

Private Organizations and Banking Schools

- Arkansas Bankers Association
- Bank Administration Institute (BAI)
- Bank CEO Network
- Crowe Horwath, LLP
- Financial Mangers Society
- Florida Bankers Association
- Graduate School of Banking at LSU
- Graduate School of Banking of Madison
- Illinois Bankers Association
- Illinois Credit Union League
- Independent Bankers Association of New York State
- Iowa Bankers Association
- Kansas Bankers Association
- Michigan Bankers Association
- Minnesota Bankers Association
- Missouri Bankers Association
- Montana Bankers Association
- National Association of Independent Insurers
- Nebraska Bankers Association
- New Mexico Bankers Association

- New York State Bankers Association
- North Carolina Bankers Association
- Oklahoma Bankers Association
- O'Rourke, Sacher, & Moulton
- Pennsylvania Bankers Association
- Property Casualty Insurers Assn. of America
- RSM McGladrey
- Sendero Institute
- South Dakota Bankers Association
- Texas Bankers Association
- University of Tennessee
- Virginia Bankers Association
- Western Independent Bankers
- Wisconsin Bankers Association

Government Institutions

- Federal Home Loan Bank
- Federal Reserve Bank of Chicago
- Federal Reserve Bank of Cleveland
- Federal Reserve Bank of Kansas City
- Federal Reserve Bank of Philadelphia
- NCUA Capital Markets Specialists