



# Bruce Simpson, CFA, CFP®

Senior Portfolio Manager

Bruce joined MainStreet Advisors in 2014 and serves as portfolio manager for several client relationships. He is also a member of the firm's Investment Committee which establishes investment strategy and policy.

Prior to joining MainStreet Advisors, Bruce was with Geneva Investment Management, implementing investment strategies and goal-based financial plans for private clients. In that role, he worked closely with clients in the development and implementation of investment strategies. Additionally, he worked for William Blair & Company where he managed both private client and institutional portfolios.

## EDUCATION

*University of Chicago*, MBA in Finance and Statistics

*Northwestern University*, BA in American History

CFA® Charterholder

Member of the CFA Institute

Member of the CFA Society Chicago

CERTIFIED FINANCIAL PLANNER™

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MainStreet Advisors is an investment advisory firm dedicated to serving wealth management professionals while helping clients work toward their investment objectives. The firm provides portfolio management, investment research, and marketing support services. MainStreet Advisors maintains Portfolio Management Solutions to provide institutions the right tool for every client situation and to help increase efficiency. MainStreet Advisors cultivates and carefully sows the seeds of growth for fiduciaries around the country. | MainStreet Advisors | 120 North LaSalle Street | Suite 3300 | Chicago Illinois | [mainstreetadv.com](http://mainstreetadv.com)