
Gateway Financial Group, Inc.

Our Team



Charles E. Bergamo

Relationship Manager

Phone: 412-497-1754

Fax (secure): 412-338-0140

cbergamo@gatewayfinancial.biz

"There is nothing impossible to him who will try." – Alexander the Great

Charles joined the Gateway Financial team in 2022 as Relationship Manager. With a problem-solving attitude, and a client-oriented mindset, Charles is suited to engage effectively with financial professionals, and clients. With over 10 years of industry knowledge combined with his own life experiences, his mission is to leverage his unique background to uncover the most advanced and sophisticated strategies and insurance solutions best suited for clients of Gateway Financial. In his role, Charles:

- Cultivates strong relationships with new partners and financial professionals, while maintaining and nurturing existing relationships. Proactively discusses and reports partnership progress on a regular basis to ensure forward momentum is maintained.
- Manages multiple projects, initiatives, and case management tasks concurrently while consistently following stringent internal protocol.
- Performs due diligence on carrier and product selection and assists in the selection of life insurance products for new business placement. Collaborates with the case design team to recommend objective, quantitative and qualitative solutions for Gateway's clients.
- Assists in maintaining workflow management reports for cases in progress and updates internal systems on a regular basis, as well as collects and maintains client/advisors' information in Gateway's CRM databases.
- Actively participates in all M Financial Magnet Program webinars, meetings and other required programs as defined under the two-year Magnet Development Program. Attends weekly training programs regarding concept sales, and life insurance solutions for UHNW markets.
- Demonstrates strong people skills with the ability to engage effectively with various levels of management, staff, and clients. Through direct and indirect means, provides critical support to business development initiatives.

As an elder of a special needs sibling, Charles is an enthusiastic advocate for Special-Needs Planning. Having witnessed his own parents self-navigate the landscape over two decades with little-to-no external knowledge or support afforded to them, Charles understands the critical importance of providing education for families with special needs. Charles is looking forward to incorporating his passion and advocacy for special needs into the Gateway process and culture.

Charles resides in Mount Washington, PA with his partner, Nadia. He is an avid lover of history, traveling, genealogy as well as the New York Yankees, Miami Heat and Dallas Cowboys. Fun Fact: Charles has traveled to Europe over half a dozen times and has the goal of one day owning a Villa in one of his ancestral hometowns in Southern Italy, near Mt. Vesuvius.

Education and Affiliations:

- Central Connecticut State University, Bachelor of Science Degree in Finance
- Studied abroad at Università Cattolica Sacro del Cuore located in Milan, Italy
- FINRA Series 6 and 63 registrations
- Licenses: LAH
- SYNGAP1 Foundation, Member

Charles is a registered representative of M Holdings Securities, Inc. Securities offered through M Holdings Securities, Inc. A Registered Broker/Dealer, Member FINRA/SIPC. Gateway Financial is independently owned and operated.

www.gatewayfinancial.biz