



Kassouf Wealth Advisors is an Independent, fee-only Registered Investment Advisor (RIA). Working with our clients, our team helps organize, manage, and preserve wealth through proven financial strategies.

We are committed to acting in our clients' best interests. Registered with the Securities and Exchange Commission (SEC), we accept a fiduciary role as we serve our clients. As an independent advisor who does not accept compensation or commission from any third-party, we avoid potential conflicts of interest.

Our wealth management team consists of CERTIFIED FINANCIAL PLANNER™ practitioners and Personal Financial Specialists. We believe that wealth management is the careful planning and execution of strategies to achieve your financial goals. We assist clients in the development of their individual wealth management strategies through financial

planning and fee-only investment advisory services. Our diverse background and team approach allow us to deliver a comprehensive experience for our clients.

You tell us what is important to you. Your goals drive the planning process. We work to understand the unique needs of each client, and customize our advice around you.

**Gerard J. Kassouf, CPA
Managing Member**

**2101 HIGHLAND AVENUE SOUTH
SUITE 650
BIRMINGHAM, AL 35205
PHONE: 205-776-0100
FAX: 205-776-0101**

KASSOUF WEALTH ADVISORS

Gerard J. Kassouf, CPA
Managing Director

2101 Highland Avenue South
Suite 300
Birmingham, AL 35205
Phone: 205-776-0100
FAX: 205-776-0101

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