





(<https://www.berkson.net>)

 **(818) 713-8060**  
bam@berkson.net  
(tel:18187138060)

 **5550 Topanga Canyon Blvd., Suite 350**  
Woodland Hills, CA 91367  
(<https://goo.gl/maps/vgXLr>)

 **Client Login**  
Enter Here  
(<https://berkson.sharefile.com/Authentication/Login>)

Join Our List

Get a free, private consultation with a financial advisor

**CONTACT US (contact-us)**

**HOW WE CAN HELP (wealth-management-services)**

## Your Fee-Only Financial Advisors In Los Angeles, CA

Preserving and growing your assets over the long term requires a wealth management strategy that is tailored to your individual goals. The financial advisors at Berkson Asset Management create customized financial plans based on your values, needs and aspirations.

We start by taking the time to understand who you are so we can see things through your eyes. Then we work in close partnership with you to craft a disciplined investment strategy designed to minimize risk and maximize your long-term financial health.

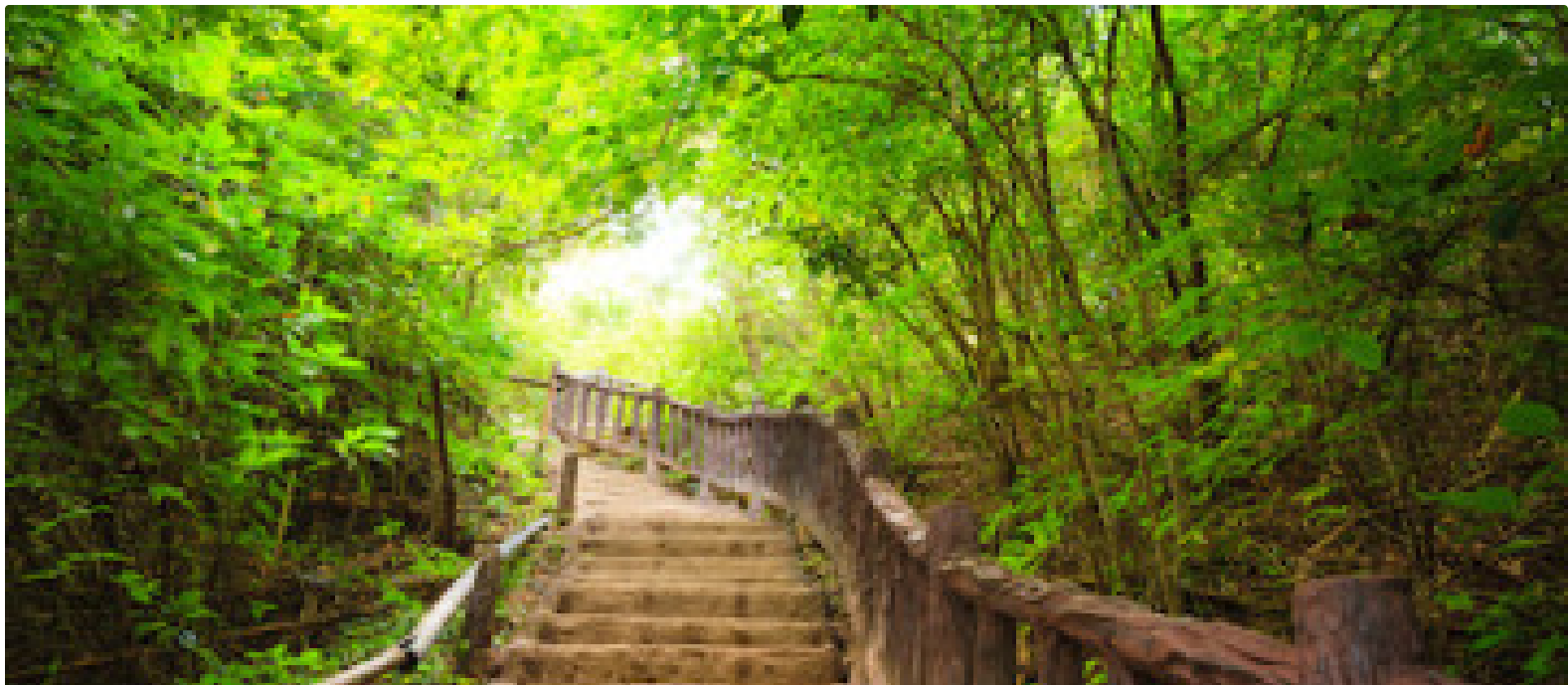


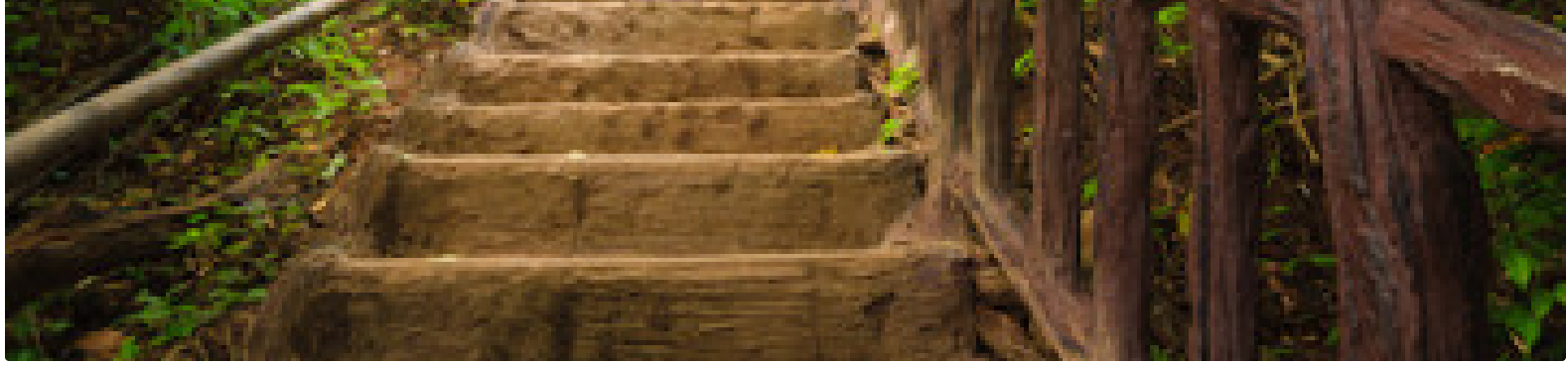
(<https://www.berkson.net/financial-planning/>)

### **FINANCIAL PLANNING ([HTTPS://WWW.BERKSON.NET/FINANCIAL-PLANNING/](https://www.berkson.net/financial-planning/))**

An effective financial plan starts with learning about you. Our financial planning process begins with an initial interview during which we explore your values, passions, goals, needs, family situation, and financial status.

**READ MORE ([HTTPS://WWW.BERKSON.NET/FINANCIAL-PLANNING/](https://www.berkson.net/financial-planning/))**



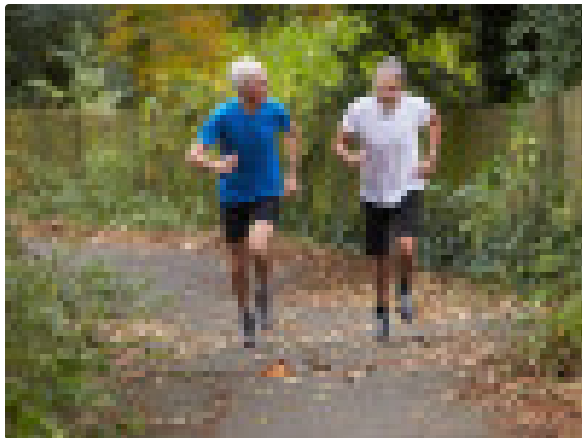


(<https://www.berkson.net/investment-management/>)

## **INVESTMENT MANAGEMENT ([HTTPS://WWW.BERKSON.NET/INVESTMENT-MANAGEMENT/](https://www.berkson.net/investment-management/))**

Investment management is key to any long-term financial plan. At Berkson Asset Management, we incorporate modern portfolio theory together with the legal and ethical aspects of fiduciary conduct in our investment management process.

**READ MORE ([HTTPS://WWW.BERKSON.NET/INVESTMENT-MANAGEMENT/](https://www.berkson.net/investment-management/))**



## **RETIREMENT PLANNING ([HTTPS://WWW.BERKSON.NET/RETIREMENT-PLANNING/](https://www.berkson.net/retirement-planning/))**

Achieve a secure and satisfying retirement.

(<https://www.berkson.net/retirement-planning/>)



## **ESTATE PLANNING ([HTTPS://WWW.BERKSON.NET/ESTATE-PLANNING/](https://www.berkson.net/estate-planning/))**

Protect your family and leave a meaningful legacy.

(<https://www.berkson.net/estate-planning/>)



## **FINANCIAL PLANNING FOR WIDOWS AND WIDOWERS ([HTTPS://WWW.BERKSON.NET/FINANCIAL-PLANNING-FOR-WIDOWS-AND-WIDOWERS/](https://www.berkson.net/financial-planning-for-widows-and-widowers/))**

Find your way after the death of a spouse.



(<https://www.berkson.net/financial-planning-for-widows-and-widowers/>)

### **401K PLANS ([HTTPS://WWW.BERKSON.NET/401K-PLANS/](https://www.berkson.net/401k-plans/))**

Get a better retirement plan for your business.



(<https://www.berkson.net/401k-plans/>)

## **Advisors With Experience, Objectivity, Integrity**

---

Berkson Asset Management is an independent financial advisor firm based in Los Angeles. We are a fee-only Registered Investment Advisor (RIA) – we do not receive commissions on product sales, and our financial planners always place your needs first. We specialize in helping individuals and families with high net worth, executives, widows and widowers, charitable entities, private foundations and small-business owners.

Does your current investment portfolio carry too much market risk? Are you worried that your investments lack diversification? Have you been operating without the guidance of a solid, comprehensive financial plan?

If any of these questions concern you, contact Berkson Asset Management. (<https://www.berkson.net/>) We offer the experience, objectivity and integrity you need to place your financial journey on solid ground.

## **Your Guide To Long-Term Financial Health**

---

Learn about our wealth management and investing philosophy by ordering *A System for Accomplishing Your Long-Term Investment Goals*. This White Paper explains the core concepts behind effective portfolio management, retirement planning, estate planning, financial planning and money management. To order your free copy, [click here \(https://www.berkson.net/a-system-for-accomplishing-your-long-term-investment-goals/\)](https://www.berkson.net/a-system-for-accomplishing-your-long-term-investment-goals/).

## Who Are We?

---

A natural extension of our well regarded CPA firm, Berkson Asset Management, Inc. is a sought after independent financial services firm trusted by colleagues and clients for our integrity, innovation and consistently superior service.

At Berkson Asset Management, our mission is to provide the highest level of personalized financial guidance, together with a broad range of fee-based financial planning services to a growing roster of clients.

**MEET OUR TEAM** (<https://www.berkson.net/team/>)

**Forging solid bonds with colleagues, clients and their families.**

## A Registered Investment Advisor

---



# BERKSON

## Asset Management



(<https://www.berkson.net>)

🏠 5550 Topanga Canyon Blvd., Suite 350  
Woodland Hills, CA 91367 (<https://goo.gl/maps/PYuUy>)  
☎ 818 713-8060 (tel:8187138060)  
✉ [bam@berkson.net](mailto:bam@berkson.net) (mailto:bam@berkson.net)

[Home \(https://www.berkson.net/\)](https://www.berkson.net/)

[Wealth Management Services \(https://www.berkson.net/wealth-management-services/\)](https://www.berkson.net/wealth-management-services/)

[About Us \(https://www.berkson.net/about-us/\)](https://www.berkson.net/about-us/)

[Blog \(https://www.berkson.net/blog/\)](https://www.berkson.net/blog/)

[News & Resources \(https://www.berkson.net/resources/\)](https://www.berkson.net/resources/)

[Contact \(https://www.berkson.net/contact-us/\)](https://www.berkson.net/contact-us/)

Berkson Asset Management

[Client Login \(https://portal.cchaccess.com/Portal\)](https://portal.cchaccess.com/Portal) [Form ADV Part II \(https://www.berkson.net/form-adv-part-ii/\)](https://www.berkson.net/form-adv-part-ii/)

© 2016 **Berkson Asset Management, LCC**. All rights reserved.