
Kershner Grosso & Co [/]



Develop your financial foundation. [/node/7]

There are two parallel paths to portfolio management at Kershner, Grosso & Company. The first is to exceed our client's expectations regarding service and the second is the disciplined management of client assets.

Kershner, Grosso & Company is committed to getting to know our clients and understanding their needs and goals in life. Each client is different and unique and the portfolio objectives and strategy are tailored to each client's unique circumstances. We review the portfolio goals and objectives regularly with clients, either by phone or meeting in person, to evaluate any evolving needs and implement changes as needed. We touch base regularly with letters or by e-mail regarding our current investment strategy or to report changes in portfolio holdings and the reason for those changes. Kershner, Grosso & Company also has a team of accountants and attorneys it works with that can assist clients, if needed, with complex estate planning or tax matters.

Kershner Grosso & Co.
Securities and Exchange Commission
Registered Investment Advisors

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