Brokerage Products & Services

- Annuities
- Bonds
- Brokerage Checking
- CDs
- Consolidated Asset Management
- Credit Products
- Equities
- Individual Managed Accounts
- Money Market Funds
- Mutual Funds
- Online Account Management
- Retirement Products - 401K, IRAs, SEPs, etc.
- Stock Options

Financial Planning Products & Services

- Business Planning - Business Succession Planning, Employee Benefits, Insurance, Investments
- College Expense Planning
- Estate Planning
- Financial Plan Development
- Insurance - Disability, Life, Long-Term Care
- Real Estate Tax Free Exchanges - 1031s
- Retirement Distribution Planning
- Tax Credit Programs - Oil & Gas Partnerships, REITs

EmersonEquity

Passionate About Results.

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Financial security doesn't just happen. It's something you build day after day.

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Whether it's growing your nest egg, funding your child's education or ensuring that you can retire comfortably, Emerson Equity can help you make sound financial decisions — and formulate a clear, step by step plan to help get from where you are to where you want to be.

As a full-service brokerage firm, Emerson Equity offers free investment plan check ups and seminars on a range of investment topics. Our goal is to help provide you with the information you need to evaluate your options and ultimately make decisions that will best fit your unique personal or business situation.

Objective Advice.

Unlike many financial services firms, Emerson Equity advisors are under no obligation to recommend specific financial products. This means that your investment professional is only motivated to suggest options that meet your goals.

Passionate About Results.

We also understand that nothing takes the place of a firm's ability to deliver tangible results. Our investment methodology is guided primarily by the fundamentals of finance: earnings, future earnings growth and risk.

We believe strongly in diversification and investing in companies with common virtues such as solid balance sheets, projected long-term growth prospects and industry leadership.

Our active approach to money management focuses on working closely with you to proactively identify financial opportunities, meet your investment goals and achieve the highest returns within an appropriate risk profile.

And, with Emerson, you'll always know who to call. Your dedicated advisor will know your unique situation and be able to quickly address your specific customer service needs.

Pershing, a subsidiary of Bank of New York — one of Wall Street's largest and most prestigious clearing firms with almost $90 billion in total assets — holds all client funds, providing Emerson Equity with both clearing and custodial services.

Free Investment Plan Check Up.

Contact us today for a free, no-pressure investment plan check up with one of our experienced investment professionals who can help you start building that nest egg or developing a sound plan for your financial future.

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