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Kyle Kerkenbush

Director of Investments / Financial Planner
CFP®, CIMA®, APMA®, CRPC®

As Goldstein Advisors' Director of Investments, Kyle specializes in portfolio research and implementation of investment strategies. As a financial planner and advisor, Kyle works with each client to build an appropriate investment portfolio designed to help them reach their desired objectives. He enjoys educating clients about their portfolio components and market fluctuations to ensure they feel knowledgeable and comfortable with their strategy, helping them to stay focused on their long-term goals.

Kyle seeks to find a balance of appropriate risk and growth components intended to address each client's unique goals and needs. He measures his success by his clients' ability to seek the type of lifestyle they desire. Kyle enjoys working with investments and finds helping individuals and families meet their goals very rewarding.

A graduate of Winona State University, Kyle majored in finance and minored in business administration and economics. He also attended the executive education program through Wharton School of the University of Pennsylvania, where he received his CIMA® certification.

Kyle likes to find a balance between work and family time, and he enjoys coaching, engaging in golf and hockey, and playing sports or outdoor games with his wife, daughter, and son. One day, Kyle hopes to attend the Masters and a Stanley Cup hockey game.

AREAS OF FOCUS

Financial Planning, Investment Planning, Estate & Tax Planning Strategies, and Insurance/Risk Management

PROFESSIONAL DESIGNATIONS AND ASSOCIATIONS

- » Certified Financial Planner Professional (CFP®)
 - » Certified Investment Management Analyst (CIMA®)
 - » Accredited Portfolio Management Advisor (APMA®)
 - » Chartered Retirement Planning Counselor (CRPC®)
 - » Member, Financial Planning Association
 - » Member, Investments & Wealth Institute
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