
Types of Advisory Services

THE ELLERSON GROUP, INC. provides investment supervisory services, also known as asset management services; manages investment advisory accounts not involving investment supervisory services and furnishes investment advice through consultations. On more than an occasional basis, THE ELLERSON GROUP, INC. furnishes advice to clients on matters not involving securities, such as financial planning matters, taxation issues, and trust services that often include estate planning.

As of March 01, 2017, THE ELLERSON GROUP, INC. manages approximately \$130.7 million in assets for approximately 87 clients. Approximately \$130 million is managed on a discretionary basis, and \$700,000 is managed on a non-discretionary basis.