

Kate Kronstein

Client Service Associate

As a Client Service Associate at Gresham, Kate works directly with Advisors to help understand and execute our clients' needs.

Kate joined Gresham in 2025 as a Client Service Associate. In her current role, she supports Advisors in crafting tailored wealth management solutions unique to each family. From day-to-day interactions to preparing for the long-term, Kate's focus is to help our clients achieve their financial goals and ensure they can focus on what is most important to them.

Before joining Gresham, Kate worked at Deloitte where she earned her CPA and audited the investment portfolios of financial services companies. After that, she followed her passion for investments and spent three years in sell-side Equity Research at William Blair.

Outside of work, Kate can be found perfecting her yoga practice at CorePower Yoga, attending country music concerts, or searching for the most amazing glass of white wine (Stony Hill Vineyard in Napa Valley wins so far).



Certified Public Accountant

EDUCATION BACKGROUND

B.A., Accounting, Miami University
