



Welcome to R.W. Rogé & Company

Our Vision

We want to share with you our corporate vision and mission statement. This statement guides the actions of everyone in the organization. Our goals, beliefs and principles are the foundation of the work we do on behalf of our clients every day.

WHO WE ARE

We are a "Fee-Only" wealth management firm offering our clients exceptional services that empowers them to Plan, Achieve and Live® the life they want.

HOW WE BEHAVE

We demonstrate our beliefs in the way we treat each other and by the examples we set for one another. In all of our services we seek to deal with others as we would have them deal with us. We demonstrate this first and foremost by being a "Fee-Only" firm that is and acts as a fiduciary for all of our clients.

WHAT WE BELIEVE

Our greatest asset and key to our services is our people. We believe that each of us needs a sense of dignity, pride, and satisfaction in what we do. Because satisfying our clients depends on the united efforts of many. We are most effective when we work together cooperatively, respecting each other's contributions and importance.

HOW WE SUCCEED

We succeed when every decision is based on a clear understanding and belief in what we do and when we couple this conviction with sound financial planning we achieve success. We expect to achieve a fair and reasonable profit to ensure the prosperity of the firm for the benefit of our clients, employees and stakeholders.

We welcome you to our firm. We are a family run business where everyone (clients, employees and vendors) are considered members of the family.



Sincerely,



Ronald W. Rogé, MS, CFP®
Chairman and CEO



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