R.W. Rogé & Company, Inc.

Celebrating 35 Years in Business

35 YEARS ANNIVERSARY

R.W. Rogé & Company, Inc. is a fee-only wealth management firm that was founded by Ronald W. Rogé in July 1986. Although much has changed throughout the last 35 years in business, R.W. Rogé was founded on a "client first culture" and still proudly commits to acting in the best interest of its clients, all of the time, as a fiduciary. The team is dedicated to helping clients Plan, Achieve and Live® the life they desire.

	1986	2021
Number of Employees	1	9
Logo	RWR	
Number of Offices	The company was founded and run out of Ron's home office for the first few years in business.	Today, the company has two locations in New York and Massachusetts, plus the technology to work remotely from anywhere in the world.
Assets Under Management (AUM)	$2 Million	$300 Million
Technology	Land lines, floppy discs, and fax machines	Cloud storage, internet, remote desktops, and smartphones
Designations	CFP	CFP; AIFG American Institute of Financial Gerontology; AIF; CSA Society of Certified Senior Advisors; FPQP; Registered Financial Gerontologist℠
Completed Financial Plans and Plan Updates	1	4,000

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