



R.W. Rogé & Company, Inc.

Celebrating 35 Years in Business

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



Number of Offices



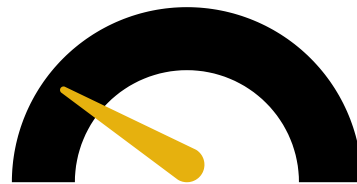
The company was founded and run out of Ron's home office for the first few years in business.



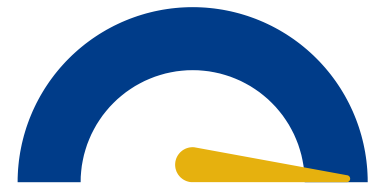
Today, the company has two locations in New York and Massachusetts, plus the technology to work remotely from anywhere in the world.

Assets Under Management (AUM)

\$2 Million



\$300 Million



Technology



Land lines, floppy discs, and fax machines



Cloud storage, internet, remote desktops, and smartphones

Designations



AIFG
American Institute of Financial Gerontology



Registered Financial GerontologistSM

Completed Financial Plans and Plan Updates

1



4,000

