APRIL 2022

OFFICE HAPPENINGS

The Official Newsletter of R.W. Rogé & Company, Inc.

Welcome

Welcome to the spring edition of “Office Happenings.” We use this column to educate, introduce people, technology, and operating systems we use, or, plan to use, to provide our clients with outstanding services. We will also keep you up-to-date and share with you the things we discover that we believe are useful, educational, funny, and just enjoyable.

What's New and Exciting?

New Office Location

The New Year brought us a new place to hang our hats. We are excited to reveal the opening of a brand-new R.W. Rogé & Company, Inc. office location!

Our new space is located at **999 Vanderbilt Beach Road, Suite 200 Naples, FL 34108**. With the addition of "Rogé South" we now have three offices to accommodate our clients that we service, both locally and virtually, across the country.

Launch of R. W. Rogé Mobile App

In January we announced the launch of "R W Rogé Mobile," an interactive app available for both Apple and Android devices.

The app allows you to securely review and monitor your account, view quarterly reports, statements, and transactions, and submit and review documents, right in the palm of your hand.

With the R W Rogé Mobile app, you can easily access our secure Client Portal while enjoying a streamlined and customized experience. Simply visit the Apple App Store, or Google Play App Store on your smartphone or tablet, and search "R W Roge Mobile" to install on your device.

Held Away Asset Management

It is our ongoing mission to provide you with the best possible service. Our new "Held Away Assets" offering allows us to manage assets outside of Schwab and report on it. For clients with 401(k) or pension plans, we are now able to assist in the management of assets outside of your portfolio. Please contact our Chief Investment Officer, Steven Rogé at steven@rwroge.com or at 631.218.0077 to learn more about this new and exciting program.

Staff Title Changes

Some of our staff titles have been updated to better reflect their roles and responsibilities within the company. For instance, Michelle Herbst was previously our "Director of First Impressions" but is now our "Operations Manager."

Be sure to check out our staff bios on our Web site to see other title changes, or just to see our smiling faces! You can access our bios by clicking here or visiting www.rwroge.com and selecting "Meet the Team" under the "About Us" section.

New Addition

We have a "new addition" to the Rogé family. Our Marketing Manager, Kelley Muhsemann, delivered a baby girl on August 27, 2021.

Please join us in welcoming Sadie Noelle Muhsemann (pictured right).

 

Professional Achievements

We are so proud that after years of attending classes, studying, hard work, and dedication, both our Chief Investment Officer, Steven Rogé (pictured left), and our Wealth Advisor, Philip Brucato (pictured right), have obtained the prestigious CERTIFIED FINANCIAL PLANNER™ (CFP®) certification!

CERTIFIED FINANCIAL PLANNER™ (CFP®) is a formal certification granted in recognition of expertise in the areas of financial, estate, and retirement planning, investing and portfolio management, tax strategies, and insurance. This professional designation is granted by the Certified Financial Planning Board of Standards, and involves rigorous education, testing and experience. In fact, Investopedia declares, “becoming a CFP® is one of the most difficult and stringent processes in terms of financial advisors. It requires years of experience, successful completion of standardized exams, a demonstration of ethics, and a formal education.”

With Phil and Steven’s achievement, we now have a total of five CFP® professionals on our team.

Ongoing Education

Each of our employees has strengths that we call their "unique abilities." We nurture their unique abilities by encouraging them to work within roles and take on tasks and projects that allow their natural abilities to shine. Whether their ability is being an expert organizer, or a financial planning mastermind – our employees are encouraged to pursue and develop their passions.

Our Senior Wealth Advisor, Christine Parisi (pictured left), has decided to further expand her knowledge base by becoming a Certified Senior Advisor (CSA™) through The Society of Certified Senior Advisors (SCSA). This program educates and certifies professionals who work with seniors through its Working with Older Adults education program and the CSA credential.

In addition, our Paraplanner, Darlene Walsh (pictured right), is attending Franklin University to study for her bachelor's degree in Financial Planning. The degree will help prepare her to take the Certified Financial Planner exam and obtain the CFP® designation.

R.W. Rogé & Company
PRIVATE WEALTH MANAGEMENT SINCE 1986

A sincere thank you to our wonderful clients for entrusting your future to us. An extra special thanks to those who reached out during our firms 35th anniversary last year, and offered encouraging words, reminded us of fond memories, or simply mentioned how great we are at giving them peace of mind and helping to shape their futures. It truly is an honor to service such an amazing group of people.

I hope you find this issue of Office Happenings informative. If there is anything you would like us to cover about office operations, our team members, or how we do things in future issues, please send us an e-mail at info@rwroge.com.

If you would like to set up a conference call or video chat with any of us, please contact our Operations Manager, Michelle Herbst, at michelle@rwroge.com, and she will coordinate.

On behalf of our entire team, we thank you for placing your trust in us to properly navigate you and your family through all of life’s challenges and celebrations.

Wishing you good health, happiness, and continued success.

Sincerely,

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