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FOR IMMEDIATE RELEASE

R.W. Rogé & Company CEO Earns Prestigious Chartered Advisor in Philanthropy® (CAP®) Designation, Deepening Commitment to Clients and Community

[BOHEMIA, N.Y., August 5, 2025] – R.W. Rogé & Company, Inc., an independent fee-only wealth management and financial planning firm, is pleased to announce that Chief Investment Officer and Chief Executive Officer, Steven M. Rogé, has earned the Chartered Advisor in Philanthropy® (CAP®) designation from The American College of Financial Services.

A graduate-level credential, the CAP® designation equips financial professionals to help clients articulate and advance their deepest aspirations for self, family, and society by integrating meaningful charitable goals into comprehensive financial and estate plans.

For Steven, pursuing the CAP® designation was deeply personal. A long-time supporter of local nonprofits and national organizations, Steven has always believed that wealth planning should extend beyond financial security to include the impact clients wish to have on their communities and the causes they care about.

“Giving back has always been important to me and my family, so earning the CAP® designation felt like a natural step,” said Steven. “It allows us to open the door to conversations that go far beyond portfolio growth; conversations about legacy, purpose, and the positive change our clients want to leave behind. I’m honored to help them shape that story.”

The CAP® program combines self-study with dynamic peer study groups, exploring complex strategies at the intersection of personal, business, and philanthropic planning. It also brings together advisors, attorneys, accountants, and nonprofit leaders to foster collaboration that ultimately benefits clients seeking to build lasting, intentional legacies.

“Our firm was founded on a “client-first” promise, which means guiding clients to achieve their most important life goals, not just their financial ones,” added Steven.

“Whether that’s supporting a cherished cause or creating a family tradition of giving, this designation expands the ways I can help bring those aspirations to life in a purposeful, strategic way.”

Steven's accomplishment continues R.W. Rogé & Company's tradition of life-long learning and commitment to holistic, values-based planning. The firm remains steadfast in its mission to help clients Plan, Achieve, and Live® the lives they envision, now with an even deeper perspective on charitable planning and purposeful legacy building.

About R.W. Rogé & Company, Inc.

R.W. Rogé & Company, Inc., is an independent, fee-only financial advisory and wealth management firm serving clients locally and across the country, with offices in Long Island, New York and Beverly, Massachusetts. We specialize in personalized financial planning, investment management, and retirement planning for individuals and families navigating life's complex financial decisions since 1986. Our firm was built on a "client-first" culture, and as fiduciaries, we are legally and ethically committed to always acting in your best interest – because that's how we believe financial advice should be.

To learn more about R.W. Rogé & Company, Inc., visit www.rwroge.com.

About The American College of Financial Services

The American College of Financial Services, founded in 1927, is a leading nonprofit educational institution dedicated to financial services professionals. The College offers rigorous designation, degree, and certificate programs, including the prestigious CFP®, ChFC®, CLU®, and CAP® designations. With a mission to benefit society by educating and advancing the financial services profession, The College serves thousands of professionals seeking to deepen their expertise and better serve clients.

To learn more about The American College of Financial Services, visit <https://www.theamericancollege.edu/>.

For media inquiries or to schedule an interview with our team, please contact Marketing Manager, Kelley Muhseman at kelley@rwroge.com or 631-218-0077.

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