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FOR IMMEDIATE RELEASE

R.W. Rogé & Company Wealth Advisor & Director of Investment Research Earns Certified Exit Planning Advisor (CEPA®) Designation

[BOHEMIA, N.Y., December 4, 2025] – R.W. Rogé & Company, Inc. is proud to announce that Christopher Kehoe, CFA®, CEPA®, Wealth Advisor & Director of Investment Research, has officially earned the Certified Exit Planning Advisor (CEPA®) designation from the Exit Planning Institute, joining an elite community of multidisciplinary business advisors worldwide.

The CEPA® program is one of the most widely accepted and endorsed professional programs in the exit-planning industry, equipping advisors with the deep expertise needed to help **business owners** align their business, personal, and financial goals using the Value Acceleration Methodology™, and helping entrepreneurs create transferable value and prepare for a successful transition. The program is taught by faculty members who are nationally recognized experts, authors, and practitioners in their respective fields.

Christopher completed the Institute's five-day executive MBA-style program, which included approximately 100 hours of pre-course study, 30 hours of classroom instruction, and a comprehensive three-hour proctored exam. His new designation enhances the firm's ability to guide business owners through succession planning, value building, transition readiness, and long-term wealth alignment.

"We are incredibly proud of Chris for earning the CEPA® designation," said Steven M. Rogé, MS, CFP®, CAP®, AIF®, Chief Investment Officer & CEO of R.W. Rogé & Company, Inc. "This achievement deepens the value we bring to business-owner clients who are navigating complex financial, operational, and family considerations. Chris continues to elevate our firm's ability to help clients Plan, Achieve, and Live® the life they desire."

About R.W. Rogé & Company, Inc.
R.W. Rogé & Company, Inc. is an independent, fee-only fiduciary financial planning and investment management firm founded in 1986. With offices on Long Island, New York, and in Beverly, Massachusetts, the firm helps individuals, families, and business owners achieve long-term financial success through personalized guidance, thoughtful

planning, and disciplined investment management. The firm's advisory team includes multiple CFP® professionals and specialists committed to delivering a "client-first" culture as fiduciaries.

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

About the CEPA Program
The Certified Exit Planning Advisor program was specifically designed for business advisors who work closely with owners of privately held companies. The organizing principle of the program is Master Planning, the alignment of the three legs of the stool (business, personal, financial), which is executed through the implementation of a process called the Value Acceleration Methodology™. Using an executive MBA-style format, the program includes a combination of lectures, group discussions, case studies and individual exercises to introduce participants to these concepts and to reinforce skills. The program is taught by the Exit Planning Institute's faculty of advisors, who are all sought after subject matter experts and authors.

To receive the CEPA® credential, Christopher Kehoe, completed the 5-day program that involved approximately one hundred hours of pre-course study, thirty hours of classroom instruction, and the successful completion of a 3-hour proctored exam.

About the Exit Planning Institute
Founded in 2005, the Exit Planning Institute provides education, resources, and professional collaboration for advisors across wealth management, financial planning, accounting, legal, consulting, and M&A disciplines. The organization is known for establishing industry standards, advancing thought leadership, and offering the CEPA designation, which qualifies for continuing education credits across numerous professional associations.

To learn more about the Exit Planning Institute, please visit www.Exit-Planning-Institute.org or reach out at (216) 712-4244 for more information.

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

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