

50

AdvisorHub

NEXT GEN

ADVISORS

TO WATCH

2026



#11

Steven

Rogé

R.W. Rogé & Company, Inc

Bohemia, NY

Scale: 79.5 | Growth: 78.3

We've created the **1,000 Advisors to Watch** to recognize excellence in all types of practices and advisors. We received nominations from 2,170 firms and advisors. Nominees were required to have a minimum of seven years' experience, at least \$150m in AUM, 2 years at their current firm in good standing, and a clean regulatory record (two or fewer complaints and no significant judgements). Advisors are ranked on a 100-point scale in three categories. SCALE: Relative size of assets, production and quality of service; GROWTH: Relative year-over-year change in assets, clients and production; PROFESSIONALISM: Regulatory record, community involvement, mentorship and team makeup. Data collected is from 12/31/2024 to 12/31/2025. Award is valid from June 2026 – 2027. Participation in the ranking is open to any firm or advisor and there are no fees for participation.