

15 years



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PICTURED, STANDING, LEFT TO RIGHT: BRYSON ROOF, LINDSAY OWENS, JEFFREY ROOF, ANDREW CROBAK AND RALPH MANNA III. FRONT ROW, LEFT TO RIGHT: KEVIN ROOF AND BRADLEY NEWMAN.

ROOF ADVISORY GROUP INC.

WHEN YOU'RE SERIOUS ABOUT MANAGING YOUR MONEY®

ROOF ADVISORY GROUP INC. WAS FOUNDED at the encouragement of local attorneys and accountants who were seeking a truly independent option for their clients in need of a level of investment expertise that did not exist in the area.

“Our approach was novel at the time, being an independent, Registered Investment Advisor with the sole mission of delivering objective investment management and financial advice to our clients on a fee-only basis,” said E. Jeffrey Roof, president and founder. “Since our inception 15 years ago, we have achieved record growth in assets under management each consecutive year.”

In January 1998, Roof Advisory Group became incorporated and first opened its doors in Camp Hill. At the end of the first year, the firm’s assets under management (AUM) totaled \$800,000. In five short years, the AUM reached \$25 million, the office relocated to its current location in Harrisburg and it transitioned registration from a state-specific license to the United States Securities & Exchange Commission.

Today, Roof Advisory Group provides direct and ongoing portfolio management to more than 180 high-net-worth relationships that include individuals, trusts,

not-for-profits, foundations, municipal pension plans and corporations. The firm’s AUM has now grown to more than \$280 million despite volatile market conditions throughout its 15-year history.

With an allegiance to its clientele, Roof Advisory Group prides itself on integrity, the trust of its clients and providing bottom-line results. The firm takes a unique approach to servicing clients’ needs — all clients are clients of the firm, rather than one individual professional. This team approach allows clients to utilize the knowledge and skills from multiple professional backgrounds, which adds value to the relationship.

Roof Advisory Group’s reputation for outstanding service and expertise has made it the region’s premier investment management and financial planning firm. These high-standards have consistently been recognized nationally by professional industry publications such as Financial Advisor, Wealth Manager, Investment News and Moss Adams, repeatedly ranking the firm as one of the nation’s top professional investment advisers in the country.

“Even as we celebrate 15 years of top-tier investment management, we are poised for future growth and expansion to continuously meet the needs — and provide sophisticated investment services — for our existing and future clients,” Roof said.

1998	1	E. Jeffrey Roof	\$800,000	Pennsylvania	1
&	FULL-TIME EMPLOYEES	PRESIDENT & FOUNDER	ASSETS UNDER MANAGEMENT	GEOGRAPHY COVERED	LOCATIONS
2013	7	E. Jeffrey Roof	\$280,000,000	nationwide	1