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Local Investment Professional Expands National Industry Panel

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Invited by the financial industry's publication, Investment News, E. Jeffrey Roof, President of Harrisburg's Roof Advisory Group, Inc. recently presented at the national conference for top performing investment advisor firms in Chicago, IL. Mr. Roof was one of three experts selected to share his expertise in the organic growth and management of Roof Advisory Group, the award-winning, client-centric firm.

On Tuesday, October 14th, investment advisors from around the country met in Chicago for the Investment News's Best Practices Awards and Workshop. The workshop was comprised of multiple panel discussions with topics ranging from profitability and performance to human capital and technology.

During the best practices session, Mr. Roof had the pleasure of participating as an expert panelist to discuss the strategies used to become a top performer. The discussion contained a breakdown of business plans and models, management tactics, and how each firm uses benchmarking and industry research.

Roof Advisory Group, representing a smaller, niche-focused strategy, distinguished itself by centering the discussion on the needs of its high-net worth clientele. As an investment advisor that focuses primarily on organic growth, Mr. Roof stressed the importance of continuing to provide its clients with top-tier service. Instead of creating growth through mergers and acquisitions, it concentrates its efforts on increasing the dollars managed by current clients and expanding its investor base. This differentiates Roof Advisory Group from its larger competitors.

In addition to Mr. Roof, the panel consisted of two other financial advisors representing a broad range of firm sizes and niches. Ron Carson, founder of Carson Wealth Management Group in Omaha, NA, represented the \$4.3 billion firm by discussing process improvements through technology. Robert Glovsky, Vice Chair and Principal of

The Colony Group, headquartered in Boston, MA with assets reaching \$3.8 billion, discussed the requirements for acquisition candidates and business partners. Mr. Roof was delighted at the opportunity to share the firm's strategy for success and growth. Roof Advisory Group will continue to push for improved productivity and profitability, while maintaining its core client-focused principals and striving to be the best resource for their clients.

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Roof Advisory Group is an independent, Registered Investment Advisor with the United States Securities & Exchange Commission. The sole mission of the firm is delivering objective investment management and financial advice on a fee-only basis.