



IN THE NEWS

FIRST QUARTER 2008

January 22, 2008 “VIX Flash Fears, Nurtures Hope”

SmartMoney
THE WALL STREET JOURNAL MAGAZINE

by Paulette Minitier

Steven Rogé, a portfolio manager at wealth-management firm R.W. Rogé in Bohemia, N.Y., says now is the time for long-term investors to initiate or add to positions in companies with strong fundamentals.

January 25, 2008 “Bet on Boston Beer Company”

Kiplinger.com

by Robert Frick

Both Rogé and Feeney make a strong case that the SAM selloff has been overdone. “The stock market is too worried about the short term,” Rogé says. “If you look at net asset value of the firm and the value of its brand, the company hasn’t missed a beat.”

February 11, 2008 “12 Ways to Recession Proof Your Life”

CNNMoney.com

by Stephen Gandel

Slim down the debts. Your best investment in hard times is to pay down credit-card and other high-interest debt. Ron Rogé, a planner in Bohemia, N.Y., says the way to do that is to cut discretionary spending - and start with big items. “

March 8, 2008 “A Temporary Band-Aid, Not a Fix”

Investment
THE VOICE OF INDEPENDENT
ADVISOR

by Steven Rogé

For now the Sovereign Wealth Funds are providing a welcome, and needed, dose of liquidity at a time when the U.S. economy is undergoing a period of slowing growth and financial markets are experiencing distress.

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March 24, 2008 “Bear Funds: Worth the Risk?”

Kiplinger.com by Robert Frick

There’s also a psychological benefit to owning a bear fund, Rogé says. When the market plunges, as it has done on many days during the current rough patch, a bear fund will mitigate your losses. “Let’s call it a floor on the emotional distress that clients will feel,” Rogé says.

March 26, 2008 “6 Blunders That Ruin Retirement Plans”



by Katy Marquardt

Underestimating life expectancy: Retirees are living longer these days, thanks to more healthful lifestyles, medical breakthroughs, and healthcare reforms. Rosanne Grande of R. W. Rogé & Co. on New York’s Long Island says her firm’s plans run to age 100. “We invest for the long term, not the short term, now that people are living 30 and 40 years into retirement,” Grande says.

March 28, 2008 “Stocks: The Next Hot Sectors”



by Gene Marcial

Steve Rogé, an investment manager at R.W. Rogé, is also not sanguine about the outlook. There are “pockets of opportunity” for value investors, he says, but he expects any market bounce would last for just a month or so. “The recession may have been already priced into the market, but not the credit bubble,” warns Rogé.

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