



## IN THE NEWS

SECOND QUARTER 2008

**April 3, 2008** “How to Feast with the Vultures”

**BusinessWeek**

by Anne Tergesen

Chairman Ian Cumming and President Joseph Steinberg practice “the epitome of distressed investing,” says Steven Rogé, whose Rogé Partners (ROGEX) and Rogé Select Opportunities (RSOFX) funds are shareholders.

**April 5, 2008** “Taking Responsibility for your own Retirement”

**Newsday**

by Saul Friedman

Rogé said many younger boomers have become “boomerang kids,” moving back home with their parents after a job loss or divorce. Or, as their parents grow older, the adult children who have families of their own -- the so-called sandwich generation -- are obliged to help their older loved ones financially, which can cripple retirement savings.

**April 6, 2008** “Aid to Make Homes Accessible”

**THE WALL STREET JOURNAL** by Theo Francis

However, only medical expenses exceeding 7.5% of adjusted gross income generally are deductible. A physician should also approve the changes as medically necessary in writing, says Rosanne Grande, a financial adviser in Bohemia, N.Y., who has had several clients make their homes more accessible.

**April 11, 2008** “Good Time to go Bottom Fishing for Telecoms”

**SmartMoney**  
THE WALL STREET JOURNAL MAGAZINE

by Dan Burrows

As Steven Rogé, manager of the Rogé Partners (ROGEX) and the Rogé Select Opportunities (RSOFX) mutual funds, points out. “We don’t like recommending sector-specific ETFs for the most part”.

**May 1, 2008** “Watch List-IA 25 for 2008”

**Investment**  
ADVISOR

by Kara Stapleton

“I have a philosophy about life,” says Rosanne Grande, managing director at the fee-only advisory firm R.W. Rogé & Company in Bohemia, New York. “A negative experience creates the environment and opportunity to achieve something good.”

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**May 24, 2008** “Streamline Your Financial Life”



by Karen Hube

It's important to diversify, but don't go overboard, especially with mutual funds. "You'll end up with a lot of overlapping investments that don't add value to your portfolio," says Ronald Rogé, an investment adviser and certified financial planner at R.W. Rogé & Co. in Bohemia, N.Y.

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**March 28, 2008** “Small is Beautiful”



by Ben Steverman

An advantage of small caps is they often have more simple businesses that are easier to understand than big, sprawling conglomerates such as General Electric (GE), says Steven Rogé of the Rogé Partners Fund (ROGEX) and the Rogé Select Opportunities Fund (RSOFX). He believes it's easy to find a stock that matches your particular criteria.

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**June 2, 2008** “Rate Escapes”



by Linda Stern

Don't go overboard. It's good to keep about 5 percent of your investment portfolio reserved for anti-inflation investments, says Bohemia, N.Y., financial adviser Ron Rogé.

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**June 12, 2008** “This Rally's for Wall Street”



by Alexandra Twin

“The fact that there is continued M&A activity in the market gives hope,” he said, as it shows that U.S. companies are still valued internationally and that global business activity is holding up, said Steven Rogé, portfolio manager for R.W. Rogé & Co. investments, says Bohemia, N.Y., financial adviser Ron Rogé.

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