# Investment Portfolio Evaluation

(/investment-process/)

**Our Process (/investment-process/)**

Each person's investment situation is unique and addressed as such. Our recommendations are always made in a way that maximizes returns within jointly determined risk parameters.

Get the Details (/investment-process/)

(/about-us/client-profiles/)

**Our Clients (/about-us/client-profiles/)**

From professionals, lawyers, business owners to those retirement-ready or seeking a solid financial plan, you'd be hard-pressed to find a scenario that we have not worked with successfully. View Client Profiles (/about-us/client-profiles/)

(/our-services/how-we-charge/)

**How We Charge (/our-services/how-we-charge/)**

We charge an investment management fee, no commissions, no revenue sharing, no nonsense. As a result, our invoicing is simplistic and transparent.
Find Out More (/our-services/how-we-charge/)

# TRULY FEE ONLY FIDUCIARY INVESTMENT ADVISORS

There is a great amount of comfort in knowing that your financial future is secure. Whether you are planning your retirement or ready to have your hard-earned assets managed by an expert,

**Roof Advisory Group is:**

**PROFESSIONAL**
Expertise that is focused and disciplined. Our process is designed to mitigate downside portfolio risk while optimizing overall investment returns when compared to clearly identified benchmarks.

**FIDUCIARY**

Bound by regulations to provide non-biased investment management clients c
trust, reflecting the firm’s core concept of integrity.

**RESPONSIVE**

Firm members are all responsible for prompt communication to each client no matter the size.

**PERSONAL**

We consider each client’s individual needs and situation before making any recommendation.

## GET SERIOUS ABOUT MONEY MANAGEMENT

When you’re serious about managing your money you need a trusted fiduciary investment advisory firm that will create a plan based on your unique needs for:

Retirement Planning
Wealth Management
Inherited Wealth
Portfolio Management
Financial Planning
Investment Advice

Roof Advisory Group has a team of in-house experts in wealth management, financial planning, and investment analysis that create personalized results. Our duty of care and loyalty puts the clients’ best interests first.

Learn more... (/our-services/)

# Schedule an Appointment

Contact us for a portfolio evaluation.

*Your name

*Email Address

I would like to discuss...

☑ I'd like to receive your newsletters.

Send

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We provide the confidence and clarity required to address today's complex investment management and financial planning needs.

## Contact Us

When You're Serious About Managing Your Money. ®

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