ROBLE BELKO & COMPANY

Roble Belko & Company

Roble Belko & Company is an investment advisory firm located in Pittsburgh, PA offering wealth and risk management services for high net worth individuals, families, and small institutions. We believe in the fundamental principle that investment diversification leads to capital preservation over the long run. Our investment strategies cater best to clients who want to preserve and enhance their assets through a holistic approach and seek to cultivate deep relationships with their advisors.

Whether for a family or institution, our disciplined process is centered on an asset-liability management framework to provide long run solutions toward their objectives. This approach relies on a proprietary risk management system developed as a result of several decades of capital markets experience. For families we further overlay a coordinated service offering to drive a transparent and integrated wealth management platform across various important aspects of their lives.

Our Holistic Service Offering

People

Our Principals have over sixty years of combined experience in the investment industry. Our Team is homegrown and also comes predominantly from prior careers in the institutional markets. They have worked their way toward advanced degrees and certifications such that they are best prepared to add value for our clients. This is important, since we believe very much in a team oriented approach to our client service delivery model.

Process

We have developed an investment process well suited for institutional clientele, however we utilize the same disciplined process for our family clients. Given our fiduciary obligation to our clients, we’ve incorporated many different risk management tools into our process. Investment decisions are driven via a healthy combination of quantitative and qualitative analysis, some of which can be attributed to our years of experience in the investment industry.

Technology

We have custom built the key systems we use for our investment process, including our proprietary risk management system and our investment model. In our desire to be as transparent as possible, we have customized a financial dashboard with daily feeds of various investment metrics we utilize as advisors and portfolio managers. This technology has further enhanced the client experience, while creating greater efficiencies in the delivery of information and service.

Our Clients

Families

Family. Assets. Lifestyle. Legacy.

Roble Belko & Company serves as a financial advisor to a select group of entrepreneurs, business owners and executives who, with limited exceptions, have a minimum of $2 million in investable assets. Our clients are typically, but not always, first generation wealth creators who desire a diversified and disciplined investment approach seeking superior results over the long run. By working with a controlled number of clients, we are able to provide a holistic service offering which emphasizes an integrated wealth management approach for the whole family.

Institutions

Roble, Belko & Company also works with small institutions that otherwise cannot get the attention of the larger service providers. These mandates span from traditional asset allocation strategies to more sophisticated asset/liability management and cash matching strategies. Again, by working with a select number of mandates, we can provide these clients a level of service they deserve.

Our Services

Families

Asset/Liability Management

- Retirement Planning
- Risk Management
- Asset Allocation
- Income Generation
- Tax Management
- Asset Location
- Portfolio Rebalancing

Coordinated Family Services

- Next Gen Education
- Estate Plan
- Tax
- Insurance
- College Savings
- Banking
- Legal
- Philanthropy

Learn More

Institutions

Asset Management

- Custom solutions to better align assets with program funding needs
- Combined multi-decade capital market experience
- Independent manager evaluation and oversight

Risk Management

- Ongoing monitoring and oversight through a proprietary risk model
- Scenario testing and modeling to manage risks and support financial decisions

Learn More

Our Technology

View a customized Client Dashboard from any device

- View net worth snap shots at the click of a button
- Access up-to-date investment and portfolio summaries
- Organize and archive important financial documents

WHY US

- We serve as a financial advisor to a select number of clients
- We provide our clients independent, objective advice from an open architecture platform
- We offer direct access to the principals and decision makers of our firm
- We work with our clients’ other trusted professionals (tax, accounting and legal) to create an investment strategy that is tax and risk optimized
- We are committed to providing a transparent wealth management service, which includes educating our clients on every aspect of their wealth plan
- We developed a proprietary risk management system and offer a personalized financial dashboard
- Our principals together have over six decades of institutional and private client investment experience in the equity, fixed income and alternative investment markets

What is Preservation?

To us, preservation means ultimate protection – safeguarding a lifetime of investments, decisions, propositions and dreams. We often find that the concentration of risk is what creates the wealth, while the diversification preserves it. By providing our clients with a disciplined wealth management style, we never stray from the ultimate goal of wealth preservation.

Risk Management

Often times our clients have successfully passed the riskier stages of their business ventures, and have had the good fortune of a liquidity event. As their financial advisor, we provide our clients an appropriate game plan and tools to navigate investment risk and a plan that seeks to satisfy their retirement and philanthropic objectives.

Our Team

Roger W. Roble

President

Roger Roble is the President of Roble Belko & Company. Roger founded the firm in 2000 with the goal of providing independent, objective advice to a select group of high net worth and institutional clients. Roger's responsibilities include relationship management, strategic planning and business development. His extensive background in the institutional public finance markets has helped in the implementation and trading of customized municipal bond portfolios for our high net worth clients. Roger is also very involved in the coordination of our wealth management services with our clients' tax and legal advisors.

Roger received his M.B.A. degree from Carnegie Mellon University in 1986, following undergraduate studies at CMU that earned him Academic All-American Football honors in 1985. He began his career with CS First Boston in New York, subsequently working in Institutional Fixed Income Sales in CS First Boston's Philadelphia

William Belko, CFA, CFP®

Chief Investment Officer

Bill Belko is the Chief Investment Officer of Roble Belko & Company. Bill joined the firm in 2002 and is currently responsible for portfolio management, investment research and trading. Bill oversees the firm's investment process and developed the firm's proprietary risk management system . His quantitative background in equities and derivatives has helped in the risk management and liquidation of single stock exposure and portfolio hedging for several of our clients. Bill has also developed an asset/liability management system, which analyzes interest rate risk for appropriate client mandates.

Bill graduated Summa Cum Laude from California University of Pennsylvania and attained Academic All-American honors in basketball in 1984. He then received his M.B.A. degree from Carnegie Mellon University in 1986 and became a Chartered Financial Analyst (CFA) in 1991

Ryan P. Lacey, CFP®

Relationship Manager

Ryan's primary responsibilities include multi-generational financial planning and relationship management. He graduated from Edinboro University with a BBA in Financial Services and a minor in Economics. He also earned his MBA in Finance from Waynesburg University and his Certified Financial Planner designation. Ryan began his career at PNC Bank in Pittsburgh, working as a Licensed Financial Sales Consultant. His role included sales and service for all investment and bank related products. He then transitioned into the Private Client Group as a Relationship Manager, where he was responsible for providing dedicated services to high net worth clients.

and Chicago offices. Roger then spent 5 years in A.G. Edwards' Chicago office, focusing primarily on the tax exempt bond market. During his 14 years of institutional coverage, Roger traded various fixed income securities to mutual funds, bank trusts, insurance companies, corporations, and investment advisers. Roger currently serves on the Investment Committee of the Catholic Diocese of Pittsburgh and on the Board of the St. Anthony School Programs.

and a Certified Financial Planner (CFP®) in 2019.

Bill began his career with Dean Witter Reynolds in New York, working in Corporate Bond Trading and Institutional Fixed Income. He later joined Advanced Investment Management in 1989, where he helped pioneer the firm's enhanced index arbitrage strategy. Bill eventually became a senior portfolio manager, managing over $6 billion in fixed income securities, equity derivatives, common stocks and exchange-traded funds for larger institutional pension and endowment funds. Bill currently is an adjunct professor at La Roche University and he also serves on the board of the Carnegie Musuem of Natural History.

Let's start the conversation…

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