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Contact: Laura Creason
Roof Advisory Group, Inc.
717-260-9281
news@roofadvisory.com
www.roofadvisory.com

***Financial Planning* Magazine Quotes Roof Advisory Group President:
High Net-Worth Clients Need Customized Investment Expertise**

Financial Planning magazine, a leading magazine for financial planning professionals, recently released an article discussing the trend of traditional investment advisory firms aligning themselves with so-called ‘robo advisors.’ These robo advisors offer automatic, pre-packaged investment options to lower net worth clients. In the article, E. Jeffrey Roof, President of Roof Advisory Group in Harrisburg, PA, was quoted as saying that his firm “has built a reputation for its in-house active management strategy” and as such “aligning with a robo advisor could potentially dilute the brand.”

In a subsequent discussion, Mr. Roof observed that his firm’s focus is centered on providing sophisticated investment management solutions to higher net-worth clientele. As one part of the firm's comprehensive services, Roof Advisory Group has always provided robust, proprietary and actively managed mutual fund/ETF solutions for clients whose accounts are not large enough to be properly diversified or cost-effectively managed using individual securities.

Mr. Roof does not see the robo advisor concept as beneficial to his firm’s targeted clientele, nor as a significant threat to his firm’s continued growth and expansion. “Our clients are beyond that,” he noted, “having long-term financial needs and objects that warrant the level of customized service and professional investment expertise we provide on a daily basis.”

To read the full article, please follow the [link](#).

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