

ROGERS & GRAY INSURANCE AGENCY, INC.

Our Financial Services Department

Rogers & Gray, a company founded over 100 years ago, provides personal and business financial planning for its clients. We were a forerunner of the financial planning movement. Today, we are one of the industry's most innovative providers of diverse financial services.

As highly skilled professionals, we blend technical expertise and creativity to solve sophisticated financial problems. We are legal, accounting, tax, investment and insurance specialists who work together as an integral advisory team with our clients, their accountants and attorneys.

Our technical skills are matched by a talent for listening. We listen to our clients' opinions about what they need without imposing our own prejudices. We then develop solid financial plans based upon each client's unique circumstances. Rogers & Gray maintains strong ties with its clients, informing them about changes in the financial arena and adjusting programs to their evolving needs.

ROGERS & GRAY INSURANCE AGENCY, INC.

Advisory Team

David T. Robinson (1)	Financial Advisor
Mark Rezendes, CEBS	Employee Benefits Specialist
Robert D. Macallister, CLU, ChFC	Employee Benefits Specialist
Robert E. Zimmer, CLU, ChFC, CFP®	Managing Partner
Christopher M. Duffy, JD, CFP®	Tax and Estate Planning Attorney
William L. Goldman, LUTCF	Case Design/Financial Modeling
Margo Sweeney	Investment Coordinator
Todd Bragg	Investment Administrator
Beth Kennelly	Office Manager
Mary Young	In-house Underwriter (Life, Disability and Long Term Care)

Estate, Business, and Financial Planning – Design Team

David T. Robinson (1)
Robert E. Zimmer, CLU, ChFC, CFP®
Christopher M. Duffy, JD, CFP®
William L. Goldman, LUTCF
Steven H. Dubin, MST
Kevin A. Morse, CPA, MST
Lynn Bailey, CFP®, MST

Investment Planning – Design Team

David T. Robinson (1)
Robert E. Zimmer, CLU, ChFC, CFP®
Margo Sweeney
Todd Bragg
Steve Mahew, CFA (2)
Chris Surrichio, CFA (2)
Ken Corson (3)

(1) David Robinson is a Financial Advisor in the process of obtaining his CFP® designation.

(2) These individuals are located in our Broker Dealer's home office in Radnor, Pennsylvania.

(3) Ken Corson is a Senior Research and Due Diligence Analyst in the process of obtaining his CFA designation.