



NEWS RELEASE

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Roosevelt Announces New Executive Roles

New York, NY – September 10, 2013 – The Roosevelt Investment Group, Inc. (“Roosevelt”), a multi-strategy investment management firm known for its highly-regarded All Cap Core Equity strategy, announced several changes in its executive management team. Adam J. Sheer and L. David Sheer have been named Co-Chief Executive Officers and James C. Rogers, CIMA has been appointed President. Arthur H. Sheer will remain the Chief Investment Officer and Co-Chairman of the Board.

“As the firm continues to expand and evolve from its origin as a small family-owned business to a mid-size professional asset management firm with now over 45 employees, it is important that the next generation of talented employees provide firm leadership,” stated Adam J. Sheer, Co-CEO. “This announcement formalizes what has already been in transition for some time now. These employees represent fresh ideas and have the vision and professional skill set to guide Roosevelt to even greater growth in the future.”

“Roosevelt has experienced impressive growth over the past several years as assets have grown from approximately \$700 million in 2006 to over \$4 billion currently,” continued Mr. Sheer. “The firm is uniquely positioned to benefit from additional growth whether organic in nature or from select acquisitions. Our future is very promising and our investment, sales and service teams have never been stronger.”

The firm has invested considerable resources in its private client group, which has grown in personnel and in asset base. “In addition several years ago, Roosevelt entered the intermediary distribution channel through national and regional broker/dealers,” added James C. Rogers, CIMA, President and National Sales Manager. “This strategic move changed the face of Roosevelt and these firms continue today to enthusiastically support Roosevelt’s experienced sales team and national service coverage. We are delighted with our broker/dealer partnerships and pleased that Roosevelt holds a leading market share position in the All Cap category within each national firm.”

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About Roosevelt Investment Group, Inc.

Headquartered in New York City, Roosevelt manages assets for institutions, foundations, endowments, and high net worth individuals. As of June 30, 2013, our assets under advisement were approximately \$4.355 billion (consisting of about \$2.643 billion under management and roughly \$1.712 billion in programs where we supply an investment model). Roosevelt offers multiple domestic and fixed income strategies, including All Cap Core Equity, Large Cap Core Equity, Select Equity, Current Income Portfolio (CIP), Intermediate Income, Core Fixed Income, Global Enhanced Fixed Income and Balanced Portfolios, as well as two mutual funds.