



For Immediate Release

## Roosevelt Investments Announces Dynamic New Collaboration with The Foresight Companies

**Two respected firms are now aligned to serve funeral services and cemetery operators and their businesses.**

**New York, New York – March 19, 2019** – Adam Sheer, Co-Chief Executive Officer of The Roosevelt Investment Group, Inc. (Roosevelt Investments) and Daniel Isard, Managing Partner of The Foresight Companies, announced today they have entered into an agreement to provide support to each other's clients and to jointly market to the funeral and cemetery professions.

"I am thrilled that Roosevelt Investments will be collaborating with The Foresight Companies to provide additional value added services for our clients," said Adam Sheer. "Many wealth managers claim to provide comprehensive planning, but only advise clients on their liquid wealth which, in the case of a funeral home owner or cemeterian, pales in comparison to the true value of their business. Through our new collaboration, our ability to refer clients to The Foresight Companies for M&A services, valuations, accounting and human resource consulting will allow us to offer truly comprehensive planning. Additionally, we are honored to work with, and learn from, two industry icons and thought leaders, Dan Isard and Doug Gober and the entire Foresight team."

"Our company has continued to evolve for over the past four decades. We continually strive to find innovative services that our clients need. We identified that we needed a company to refer our clients to that reflects our values in how we treat our clients and provides solutions to meet their additional needs, Isard stated. "Almost 20 years ago I spoke with Adam as he expressed his desire to have a greater presence in the funeral and cemetery worlds. After months of due diligence on both sides, we have concluded that Roosevelt Investments is the company we need to align with," Dan added.

The Foresight Companies, LLC. is located in Phoenix, AZ, with offices in Louisiana and Oklahoma. The Foresight Companies, LLC. is the premier provider of integrated financial and management consulting services including valuations, accounting, family transition, strategic planning, merger, acquisition, and financing.



“I began working with Roosevelt after I first met Adam at the Death Care Management Conference and have respected their contributions to that annual event. I am even more excited to have them take care of our clients’ needs for the future,” said Doug Gober, Partner of Foresight.

Foresight Roosevelt Wealth Management aims to reinvent financial planning. We will provide holistic resources for business management, personal wealth investment, asset protection, business succession and estate planning. No matter the age of the client, we can help them craft an individualized plan to seek financial independence upon retirement or if they die or become disabled before retirement. The power of our alignment has not existed for the service of business owners in the funeral service and cemetery professions.

For interview requests of Adam, Dan, or Doug please contact Mike Miranda at 646-452-6707.

### **About Roosevelt Investments**

The Roosevelt Investment Group Inc. (Roosevelt Investments) is a privately held, unaffiliated boutique advisory firm located in midtown Manhattan and traces its roots back to 1971, when P. James Roosevelt, a cousin of former President Theodore Roosevelt, founded the investment advisory firm. The firm has been providing comprehensive financial planning and investment management services throughout the death care profession for more than 25 years.

The firm offers a range of proprietary equity, fixed income and balanced investment strategies to a wide spectrum of prominent families, high net-worth individuals, various institutional clients, and funeral and cemetery professionals and their businesses throughout North America.

Roosevelt presently advises on approximately \$2.3 billion in assets (consisting of approximately \$2.2 billion in assets under management and approximately \$67 million in programs where it supplies an investment model) as of February 28, 2019.<sup>1</sup> Of those assets under management, about \$306 million come from working with funeral homes, cemeteries, and their owners.



<sup>1</sup>Assets under advisement figures for 02/28/2019 (and as incorporated into total firm assets for 02/28/2019) exclude assets under advisement from a model-based program that Roosevelt's All Cap Core Equity Strategy participates in. The program sponsor has not yet provided Roosevelt with these asset figures for 02/28/2019.

## Contact

To learn more, please contact:

Michael Miranda, Director of Marketing  
730 Third Avenue, 23<sup>rd</sup> Floor  
New York, New York 10017  
P: (646) 452-6707  
Email: [mmiranda@rooseveltinvestments.com](mailto:mmiranda@rooseveltinvestments.com)

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