



For Immediate Release

Roosevelt Investments Acquires Value Architects Asset Management and Blueprint Financial Planning

New York, New York – October 1, 2018 – **The Roosevelt Investment Group, Inc. (Roosevelt Investments)**, a New York City based investment advisory firm, announced today its acquisition of Value Architects Asset Management, LLC (VAAM), and its affiliate, Blueprint Financial Planning, LLC, both of Hoboken, New Jersey. VAAM and Blueprint have been providing financial planning and investment management services to both individuals and institutions since 2001.

“We are thrilled that Rick and Vicki, the founders of Value Architects Asset Management and Blueprint Financial Planning, chose to join Roosevelt. They truly care about their clients and strongly embrace securities management with in-depth financial planning,” said Adam Sheer, Co-CEO of Roosevelt Investments. “Their wisdom and experience will be critical in enhancing the experience we offer all Roosevelt clients.”

Roosevelt Investments' client commitment, financial planning and risk-oriented approach to investing, fits well with VAAM's mission and investment philosophy. Value Architects' mission is to preserve and grow wealth based on a deep knowledge of the securities markets and their clients' financial needs and desires.

“The combination of both firms' experience and knowledge in investment management and financial planning will enable us to provide a more comprehensive and enduring service for our clients,” said VAAM CEO Rick Konrad. “Roosevelt shares our values in consistently putting clients' needs first and has exceeded our hopes for combining with a firm that will continue our tradition for excellent service, investment expertise, and a cultural environment our clients and associates deserve.”

About Roosevelt Investments

Roosevelt Investments is a privately held, unaffiliated boutique advisory firm located in midtown Manhattan providing comprehensive investment management and financial planning services.

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, funeral homes, cemeteries and various institutional clients.

The firm advises on approximately \$2.6 billion in assets (consisting of approximately \$2.5 billion in assets under management and \$70 million in programs where it supplies an investment model) as of August 31, 2018.

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