



For Immediate Release

Nicki Price Adams and Steven Wasserman Join Roosevelt Investments

New York, New York – August 13, 2018 – **The Roosevelt Investment Group, Inc.**, a boutique advisory firm, is excited to announce and welcome Steven Wasserman as Vice-Chairman and Nicki Price Adams as Marketing Manager – Private Client Group.

“This is an exciting time for us,” said Adam Sheer, CEO of Roosevelt. “The board and I are delighted that Steven and Nicki will help lead Roosevelt into its next stage of growth.”

Roosevelt Investments has over 25 years of experience in the death care space. “Bringing both Steven and Nicki on board will help further differentiate our firm and add tremendous value to the services we offer funeral and cemetery professionals,” Sheer added.



Wasserman comes from a background as an attorney and has enjoyed a long career in private equity, M&A advisory and investment banking where he was involved in over \$3 billion dollars in transactions. He has been named Merrill Lynch/Ernst & Young Entrepreneur of the Year and has been featured on CNN's Pinnacle and in the Wall Street Journal.

“I am thrilled to be taking on the Vice-Chairman role,” said Wasserman. “I can't wait to help lead Roosevelt, into our next phase of growth, where we will combine business and wealth management to become an even more client-focused company.”

“Hiring Steven was client driven,” said Sheer. “As wealth managers, we strive to assist our clients on their total wealth, which includes their business. Having Steven on the team helps us access the bigger picture, which enhances the value of our services for our clients.”

Wasserman’s wealth of knowledge and experience will allow Roosevelt to provide free unbiased business and succession planning advice to business owners by helping them gain the insight and strategies they need to meet their long-term goals.

Price Adams holds her MBA and Masters in Marketing and has experience in marketing and business strategy within the insurance, financial services, and death care industries. She will be responsible for creating and executing marketing strategies to drive growth for Roosevelt’s Private Client Group. She will also help with overall brand development and messaging in support of the firm’s commitment to assisting funeral and cemetery service professionals in making the best decisions to reach their goals for their future.



The death care profession is not new to Price Adams and is a business she has been around all her life. “Growing up, I would listen to my dad enthusiastically discuss memorialization and how important it is to be there to help families honor their loved ones. His enthusiasm is something that has stuck with me and has driven my passion for the profession,” said Price Adams.

“We are thrilled to have Nicki leading the marketing efforts for the Private Client Group with an emphasis focused on our death care segment,” said Corie Gabriel, Director – Private Client Group. “We’ve realized that the majority of funeral service professionals concentrate on their funeral home and cemetery trust funds, but rarely think about their individual plans for the future.”



About Roosevelt Investments

The Roosevelt Investment Group Inc. (Roosevelt Investments) is a privately held, unaffiliated boutique advisory firm located in midtown Manhattan 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 domestic equity, fixed income and balanced investment strategies to a wide spectrum of prominent families, funeral homes, cemeteries, death care professionals and various institutional clients.

Roosevelt Investments merged with Sheer Asset Management in 2002. The firm advises on approximately \$2.5 billion in assets (consisting of approximately \$2.5 billion in assets under management and \$68 million in programs where it supplies an investment model) as of June 30, 2018.

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