Funeral and Cemetery Professionals

ROOSEVELT
INVESTMENTS

Roosevelt Investments has been working with funeral and cemetary professionals for 50 years.

Why We're Here

Our connection to the Roosevelt name and the funeral and cemetery profession started 50 years ago, when we started managing assets for Youngs Memorial Cemetery[1] – where Teddy Roosevelt is buried. We've been committed to the funeral service and cemetery profession ever since. We value your work and understand your business.

Roosevelt Investments provides financial planning services for businesses and individuals, and we customize solutions for your perpetual care, preneed, and merchandise trust funds. We can help you develop an Investment Policy Statement and manage your investments based on your specific goals, risk tolerance, and state regulations.

In short, our goal is to help you keep—and grow—the wealth you've worked hard to create.

What We Offer

We offer investment management and financial planning services to business owners, families, and individuals who work in the funeral and cemetery profession. Our areas of expertise, and the services we offer, are all geared towards helping you achieve your financial goals.

Business Solutions

Exit Planning

Building a business is an incredible accomplishment, but you also need an exit plan to extract–or pass along–the wealth you've created.

Trust Management

Between preneed, perpetual care, and merchandise trusts, Investment Policy Statements, and state-by-state regulations, there is a lot for funeral home and cemetery owners and operators to manage. We can help with custom solutions based on your needs and goals.

Financing & Acquisitions

If your business has financing needs—whether it is for growth, investment, acquisition, or other needs—we may be able to help you secure it.

Over time, a successful business may encounter an opportunity to grow via an acquisition, or maybe another business offers to buy yours. We can help you evaluate your options.

[1] Does not represent client endorsement or reference

Personal Solutions

Financial Planning
Building a business is an incredible accomplishment, but you also need an exit plan to extract–or pass along–the wealth you've created.

Retirement Planning
Roosevelt can help you develop a strategy for retirement spanning investments, cash flow management, and tax planning.

Investment Management
We are dedicated to managing risk, growing and protecting wealth, and developing long-term relationships with our clients.

Estate Planning
An effective estate plan will allow you to transfer wealth with maximum efficiency and minimal taxes. We can help you build it.

Trust Management
Trusts can help families create structure and maintain control when passing wealth to future generations or charities.

Investment Solutions

Roosevelt Investments has been helping clients protect wealth and preserving legacies for generations. Our strategies are designed to help you meet your investment objectives.

Growth
Focused on capital appreciation while seeking to minimize risk over time.

Growth & Income
Balanced approach incorporates a mix of capital appreciation, capital preservation, and income generation.

Income
Fixed Income strategies focus on maximizing cash flow while maintaining and growing principal.

Value
Value approach focuses on long-term wealth building by seeking the highest compounded returns.

Working Together

Our team has over 100 years of combined experience in managing wealth and servicing clients like you.

A dedicated Wealth Advisor will work with you to build a financial plan, recommend an investment approach, and keep you updated on the markets and your portfolio. A team of Portfolio Managers will manage risk while aiming to meet your investment objectives. And a full Client Service team stands ready to meet all of your portfolio service needs.

Roosevelt Investments is committed to helping you get where you want to go.

Corie Gabriel
Director, Senior Wealth Advisor
Industry Experience: 18 years

Adam Sheer
Co-Chief Executive Officer
Industry Experience: 25+ years

Nicki Price Adams
Marketing Manager
Industry Experience: 7 years

Tim Hermann, CFP®, CExP™
VP, Senior Wealth Advisor
Industry Experience: 20 years

Sean Sokolowski
Senior Wealth Advisor
Industry Experience: 16 years

Dominick Lombardi
VP, Senior Wealth Advisor
Industry Experience: 35+ years

Victoria Fillet, CFP®
VP, Senior Wealth Advisor
Industry Experience: 25+ years

Get In Touch

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