



Recent Honors

2003 – 2008 Rodgers & Associates recognized as one of the country's top wealth managers by Wealth Manager Magazine.¹

2006 & 2008 Rodgers & Associates named as one of the country's top investment advisers by Financial Advisor Magazine.²

2006 Rodgers & Associates named as one of the 50 Fastest Growing Companies by Central Penn Business Journal.³

2007 Rick Rodgers named as a Top Adviser by Reuters Advice Point web-site.⁴

2007 – 2008 Rodgers & Associates named as a finalist in the Samaritan Counseling Centers' Ethics in Business Award competition.⁵

1. Wealth Manager magazines annual ranking of Top Wealth Managers is based on the asset value of each participating wealth manager's average client relationship as of December 31st each year and is calculated by dividing the total client assets under management by the total number of client relationships. Rodgers & Associates was ranked 404 of 478 ranked wealth managers in July of 2008.
2. *Financial Advisor's* ranking of Top Registered Investment Advisors is based on total assets under management of each participating firm as of December 31, 2007. Qualified assets included advisory accounts for which the advisor received an ongoing management fee and excluded any brokerage account and commissioned items including loaded mutual funds. Information for the rankings was obtained from a written survey mailed to qualifying firms and from the Form ADV filed with the SEC. Rodgers & Associates ranked 4th in the \$100 to \$300 Million category of advisers.
3. This annual ranking of Central Pennsylvania businesses is based on sales growth from January 1 to December 31 each year,
4. Reuters released the Top Advisers 2008 list recognizing top financial advisers in the US. Advisers were asked to complete an online survey regarding the metrics of their practice, and resulting submissions were tabulated and grouped by geographic regions. Quantitative criteria were used to benchmark advisers in categories including worth, etc.
5. Award is based on an application submitted by the company and site visit and interviews by The Counseling Center's staff.