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Monroe "Roey" Diefendorf, Jr., CFP, CLU, ChFC, CIMA of Diefendorf Capital Planning Associates, Locust Valley, was featured recently in *Registered Rep* magazine for his financial planning philosophy. A fourth-generation financial advisor who began as a high school student working in his father's NYC insurance office, Diefendorf thinks advisors should not regard their clients just as a collection of assets. Advisors, he says, need to break out of their traditional mold and get more involved in their clients' personal lives. He doesn't look at just his clients' finances, but at their "personal" and "social" wealth, too.

