



Diefendorf Capital Employees “Walk the Talk” Participating in Lift Up America

The employees of Diefendorf Capital Planning Associates volunteered to participate in a humanitarian aid effort in New York City. In a coordinated operation, the warship slipped quietly into New York Harbor. But this is no act of aggression. It's Lift Up America and its partners joined forces to attack hunger.

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In honor of the fallen heroes of 9/11/01, a city wide effort was launched to distribute food to over 100 relief organizations.

The distribution center was located at Pier 92, the berth of the USS San Antonio. Partnering in the project were the Navy, Marines, professional sports (including the NY Yankees and NY Giants), corporations and hundreds of local charitable agencies, and a host of volunteers to lift up the less fortunate in New York City.



Eight employees from Diefendorf Capital volunteered their time to help with the effort. In addition to food distribution, over 800 children were tested for both sight and hearing and those with needs were given glasses and hearing aids.

Roey Diefendorf, CEO is a Certified 3 Dimensional Wealth Practitioner believes that philanthropy is an integral part of wealth management. “As a financial advisor it is not my job to simply help people become a financially independent. We must address their total wealth (personal, financial and social wealth) to transform their lives from financial success to lives of significance.”



Diefendorf Capital Planning Associates is a firm that practices what it preaches. By getting its employees involved they are trying to set an example for their clients to follow.

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