

RFC designation. “What I found is that I actually sold more insurance after I stopped **selling** insurance and began to position myself as **offering** financial consulting.”

But with the growth of his financial planning firm, Structured Capital Designs, Inc., and the desire to be on the cutting edge, he felt the need to enter the investment advisory business. Roey’s registered investment advisory firm, Consolidated Portfolio Review Corp., was one of ten firms nationwide to win the prestigious 2000 Fleet Bank Small Business Award for significant revenue growth. However, his quest for knowledge and expertise continued as he earned his CIMA designation in 2003.

Roey has been a member of the MDRT for over a quarter of a century and is a member of Top of the Table. In addition to the IARFC as one of the early members, he is also a member of the AALU, NAIFA, IMCA, NAIBD and the FPA. In an effort to obtain independence and objectivity, in 2003 he created his own broker/dealer, Sterling Monroe Securities, LLC.

These business activities have kept him quite busy, plus raising a family of four daughters, along with numerous charitable activities. Roey was on the board of Daystar University, Athi River, Kenya and Young Life of Long Island. As a fund raiser, his greatest feat was playing 212 holes of golf in one day to raise \$37,000 for Young Life. Roey and his wife Chris, after returning from a mission trip to Africa, felt it was time to “plant” a new culturally relevant church on the North Shore of Long Island. As founders of North Shore Community Church they began with just six members (Roey, his wife and four daughters) and it has now grown into a thriving congregation of over 200 weekly attendees as part of the Presbyterian Church in America.

As an industry leader, Roey has co-authored two books; *Wealth: Enhancement & Preservation* and *21st Century Wealth*. But after 30 years in the business, Roey decided to take his practice to a new level — “total” wealth management. Because 70% of the traditional business transition plans fail after just one or two generations, he realized that something was seriously wrong. Rather than just being part of the group of advisors who perpetuate the problem, he was determined to be part of the solution for both clients and advisors. Roey and Bob Madden co-authored the book, *3 Dimensional Wealth: A Radically Sane Perspective to Wealth Management*. Their wealth formula

includes one’s personal, financial and social wealth. This book was written for the lay person.

But that wasn’t enough for Roey. After reflecting on his prior professional educational experiences, he felt they failed to address the counseling side of being an effective advisor. Along with Mark Carver, PhD, Roey and Bob Madden have now created a curriculum for professional advisors that address “Counseling through Life’s Transitions” and “Practice Enhancements.” Successful completion of 7 of the current 15 on-line/on-demand courses will earn an advisor the designation of Certified 3 Dimensional Wealth Practitioner (C3DWP) — the only designation with a number! They firmly believe that total wealth management is as much about passing on one’s values as it is about passing on one’s money. 3 Dimensional Wealth International was established as an association for similarly inclined values based professionals (www.3DWealth.org).

It is his philosophy that, “It is not enough to have your clients like you. If they only like you, they will leave you. You must give your clients a reason to love you. Becoming a C3DWP advances your perceived level of expertise, which will help you lead your clients from lives of **success** to lives of **significance**. By looking at a client’s total wealth (specifically their 3 Dimensional Wealth), I believe that you can become the most important advisor that your clients will ever have.”

Roey can be heard weekly interviewing financial professionals on his syndicated internet radio show **3 Dimensional Wealth** www.Business.VoiceAmerica.com. In January 2003 he was interviewed by Forbes Radio, and his segment aired on over 192,000 flights on American Airlines. You can also see Roey on “World Business Review” with Gen. Alexander Haig on CNBC in September 2005.

As one of the busiest RFCs, Roey demonstrates a love for learning, a talent for successful production and a passion for his community and profession. ☐

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