News

For Immediate Release

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Marianne Rodriguez of Round Table Wealth Management Makes "40 Under 40" List

InvestmentNews judges recognize her accomplishments, leadership and commitment to clients and the financial planning profession

NEW YORK, NY [June 14, 2022] – Marianne Rodriguez, CFP®, Director and Wealth Advisor at Round Table Wealth Management (RTWM), an SEC Registered Investment Advisory firm, has been named to the InvestmentNews "40 Under 40" class of 2022. This annual list recognizes professionals under 40 years old who are impacting the financial planning / wealth management profession for the better.

Rich Policastro, President of RTWM, spoke about the recognition Rodriguez has earned from her peers saying: "We were so happy to learn that Marianne was selected for the InvestmentNews 40 Under 40 class of 2022. Marianne exhibits many qualities which make her such an integral part of our firm and the lives of the clients that she supports. Specifically, her passion to help others, strong work ethic, deep industry knowledge, and thirst to always learn more is an inspiration to all of us at Round Table Wealth Management."

With over 9 years of experience in the financial services world, Rodriguez joined the Boca Raton branch of RTWM as a Wealth Advisor in September 2020. Now working in the New York office, she continues her work developing and implementing complex financial planning strategies and managing high net worth clients' investments. RTWM has four branches: its headquarters in Westfield, NJ, and additional offices in New York City, Boca Raton, FL and Bend, Oregon.

This year's "40 Under 40" honorees were selected by a judging committee comprised of InvestmentNews staff members from more than 1,000 nominations based on their accomplishments, contributions to the financial services industry, leadership and future promise.

“I feel very thankful and honored to be recognized amongst this amazing group of professionals,” said Rodriguez. “I hope my journey through the financial industry serves as evidence that being passionate about what you do can make a difference in other people’s lives. “

Rodriguez received her Bachelor’s degree in Business Administration with a minor in Marketing and Human Resources from Universidad Iberoamericana UNIBE in Santo Domingo, Dominican Republic. She earned the CERTIFIED FINANCIAL PLANNER™ marks in 2018 and is currently an active member of the Financial Planning Association (FPA). Rodriguez, who is fluent in four languages – English, Spanish, French and Portuguese – is passionate about cultural diversity and learning from people who come from different backgrounds. She has been serving the financial needs of the Southeast Florida market, coordinating all aspects of the investment management and financial advisory services for her relationships, assisting clients with personal and commercial banking solutions as well as insurance and investment guidance and advice. Her focus is to provide her clients with comprehensive planning tools and resources as they navigate life and seek to maximize the benefits of their investments and retirement planning.

ABOUT ROUND TABLE WEALTH MANAGEMENT

Round Table Wealth Management (RTWM), an independent financial advisory firm established in 1999, is managed by four partners with over 100 years of industry experience. They, along with other members of the firm, form a dedicated team of highly-credentialed wealth advisors, financial planners, and investment management professionals.

Global in their investing and personalized in their service, the firm provides objective strategies designed to meet the far-reaching goals of each client in a personal and comprehensive manner. Those clients are comprised of high-net-worth individuals, families (national and global), business owners, professionals, and women investors seeking thoughtful financial advice and guidance to grow and preserve their wealth. Assisting cross-border clients and expats with multi-national interests and a high degree of tax complexity is a key area of focus. In addition, the firm specializes in working with families and individuals who have multi-generational wealth concerns.

With approximately $1.6B in assets under management (AUM) for its clients, RTWM offers personalized advisory services supported by institutional knowledge, deep experience, and skilled expertise. Their fiduciary approach involves a suite of holistic planning services including investment, philanthropy, retirement, insurance, cash flow and tax and estate counsel.

Learn more at www.RoundTableWealth.com.

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