

Roger R. Bell II

President

Roger R. Bell entered the financial services industry in 1973 with a vision of providing comprehensive financial solutions to improve the lives of his clients. Roger's expertise and focus has been on delivering a wide scope of services that address cradle-to-grave issues and which reflect his experience in corporate banking and in all lines of insurance and mainstream investments (excluding certain commodities and hedge funds).

Roger has extensive experience advising individuals, families and corporations alike. More specifically, his solutions span a very wide range of financial and investment advisory issues, such as, planning for retirement, insurance, education, small business, home purchase/refinance/mortgages, investment advice, debt management, cash flow/budgeting, and estate and trust planning issues, medical and health care insurance, serving as power of attorney representative an trustee, marital, special needs planning for the adolescent or adult, elder care, trust and estate administration.

Roger holds a Series 7 and 65 licenses. Roger is also a licensed insurance consultant in the areas of: Life, Health, Property and Casualty.

Roger has a proven track record of delivering sophisticated financial solutions designed to nurture the core life objectives of his clients. "My greatest reward is to work with people on a sustained and intimate basis in resolving their complex financial challenges and to help them achieve their life goals," Roger says. Roger's clients report experiencing an "abiding peace of mind".

Roger and his wife of 34 years, Jane, live in Pulaski, Virginia. In his free time, Roger enjoys the tackling challenges of amateur radio and the renovation of their home. He also loves spending time with his wife and their Labrador dog, Brandy. He is active in his church family, delights in gatherings with close friends, boating on Claytor Lake, and contributing to the development of amateur radio emergency communication services on a local and statewide basis.



Areas of Expertise

- Wealth Management and Preservation
- Financial Planning
- Risk Management

Certification

- Series 7 and 65 licenses
- Licensed insurance consultant in life, health, property and casualty
- State registered independent RIA firm

Boards/Organizations

- Financial Planning Association
- First United Methodist Church of Pulaski, VA
- Pulaski County/Montgomery County Amateur Radio Emergency Services
- New River Valley Amateur Radio Club
- Pulaski County Chamber of Commerce
- Oak Hill Academy, Independence VA
- Pulaski County Rotary Club
- Virginia Baptist Mission Board
- Dublin Lion's Club
- Pulaski County Clean Community System
- Claytor Lake Baptist Assembly
- Pulaski Kiwanis Club



Professional Financial Guidance for the Life You Deserve

(540) 674-1200 • P.O. Box 1909 • Dublin, VA • 24084 •

Email: Roger@RogerRBell.com