

# RFG August Spotlight – Meet the Advisor Assistants

## **Background**

The average age of a financial advisor is about 55 years old, putting a large portion of the industry close to retirement.

At RFG we have developed an Advisor Assistant program that allows new, young advisors to develop and learn from those who have dedicated their careers to financial services. We believe that by developing a breadth of young, well-trained advisors we can continue to take care of our RFG Family for coming generations.

Over the course of August, we highlighted all of RFG's Advisor Assistants on our social media pages. In case you missed those, read below to gain a bit of insight as to who they are and where they come from!

# Sean Schaeffer



The Rosselot Financial Group

Advisor  
Assistant



## Sean Schaeffer

Sean was born and raised in Anderson Township, and still resides there today. He graduated from Anderson High School, where he was captain of the football team

After high school, Sean went on to accept a spot in the Carl H. Linder Honors-PLUS program, integrated within the Carl H. Linder College of Business at UC. This program allows its students to alternate their semesters between in-person classes and internships. Understanding the true value in this program, Sean began exploring career options that would not only inspire him, but equally match his future goals and moral values. Between his genuine passion for helping others and desire to always have the ability

to spend quality time with family, Sean began seeing his future as a Financial Advisor/Planner. Sean knows this career path will help equip him with the potential to earn money for a good lifestyle, while truly enjoying the work he does each day. Realizing there are not many career paths that check all those boxes for him, he decided to contact Nate about the possibility to join the RFG Family as an intern. Thankfully, Nate provided him with his desired opportunity!

Sean has graduated from the University of Cincinnati and has progressed to the role of advisor assistant at RFG. He holds the SIE, Series 7, and Series 66 Licenses.

“I have loved it from the start here, and I cannot wait for everything that is to come at RFG!” – Sean Schaeffer

The Rosselot Financial Group



# Max Kosman

Advisor  
Assistant



## Max Kosman

Max attends Kutztown University where he is working towards earning his degree in Personal Financial Planning while playing Rugby. In May of 2022, he officially joined the RFG Family, following in his family's footsteps as an Apprentice. Here he will work to obtain his certifications as he seeks to become a Financial Advisor.

Max currently holds the Securities Industry Essentials® (SIE®).

“I am ecstatic to begin working full-time at RFG. I’m proud to be following in my family’s footsteps and I can’t wait to see what is next!” – Max Kosman

The Rosselot Financial Group



# Nathan Young

Advisor  
Assistant



## **Nathan Young**

Nathan is from the westside of Cincinnati. Nathan graduated from Carl H. Lindner College of Business at the University of Cincinnati. This allowed him to search for a career that aligns with his values and abilities through internships and classes. In this search he quickly came to realize that based off his passions for helping others and interest in investing, that the path of becoming a Financial Advisor/Planner was becoming clear. Nathan knows that this career path will allow him to enjoy his work every day while also making meaningful connections with other members in his community. This led him

to apprenticing with the RFG Family, as they matched his values and were willing to give support for his future aspirations.

Nathan is now working full-time at RFG and is growing into a reliable Financial Professional!

Nathan currently holds the Securities Industry Essentials® (SIE®) and Series 7 licenses.

“I am looking forward to advancing my career with the RFG Family and creating long lasting relationships with clients” – Nathan Young

# Trent Rogers



The Rosselot Financial Group

Advisor  
Assistant



Trent Rogers

Trent was born in Dayton, Ohio, and later moved to Anderson Township, where he still lives today. He is an Anderson High School graduate – where he captained both the football and rugby team.

Since he has taken on the role of Marketing Apprentice at RFG, he has realized that he aspires to become a Financial Advisor. Trent found that this is a perfect fit for him because he enjoys hard work and helping people reach their goals. He also enjoys the fact that your effort as a Financial Advisor is directly correlated with your success and when your clients do well, so do you. Upon this realization, Trent decided to talk to Nate Kosman, CEO of RFG, about changing his career path towards helping people through financial advising.

Trent started working at RFG in 2021 while attending Kutztown University as an advisor assistant to pursue his career goals of becoming a financial advisor. Trent currently holds the Securities Industry Essentials® (SIE®) and Series 7 licenses.

“I love coming in to work every single day, the RFG Family truly is a family and I look forward to growing and pushing the envelope with everyone here!” – Trent Rogers