

BREAKAWAY WEALTH MANAGEMENT IS A NEXT-GEN WEALTH ADVISORY TEAM THAT VALUES SIMPLICITY AND TRANSPARENCY. WE OFFER STRAIGHTFORWARD, ACTIONABLE ADVICE DESIGNED TO EMPOWER, NOT OVERWHELM. TO MAKE YOUR MONEY WORK FOR YOU, WE ORGANIZE YOUR FINANCES, CUSTOMIZE YOUR INVESTMENTS, AND HELP YOU BUILD SMART FINANCIAL HABITS.

OUR MISSION

We believe everyone can take an active role in their finances, so our mission is to reduce stress and anxiety associated with financial investing and organization, empower smart financial habits, and make your money work for you. By simplifying the complex, we'll suggest ways to seamlessly integrate financial planning into your life so you can take care of yourself and your loved ones.



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Securities and advisory services offered through LPL Financial, a registered investment advisor. Member FINRA/SIPC.

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Roger is a principled advisor whose experience and commitment to client success earned him a spot on Forbes' "Top Next-Generation Wealth Advisors*" list in 2020 and 2021. As a respected leader, he surrounds himself with specialists catering to each client's unique needs, values, and goals.

With nearly two decades of experience in prominent firms like Morgan Stanley and Merrill Lynch, Roger has cultivated an ethical approach to wealth management that emphasizes client education, transparency, and simplicity. Working together with his team, Roger develops comprehensive and easy-to-understand personalized strategies to help clients pursue their goals with minimal risk.

Roger is an alumnus of Rutgers University and attended the Dolan School of Business at Fairfield University. He is a Certified Financial Planner™, a Chartered Retirement Planning CounselorSM (CRPC™), and holds Series 7, 66, and 31 registrations through LPL Financial.

When not working, Roger donates time to various causes; serving on the Alumni Committee for Oratory Prep School, organizing beach cleanups at the Jersey Shore, volunteering at Habitat for Humanity, and supporting Soles for Souls. During his leisure time, he enjoys skiing, boating, tuna fishing, trap and skeet shooting.

Roger's financial advice is simple yet effective: spend less than you earn and automate both your savings and investment contributions.

Pat began his financial career as a summer intern at Merrill Lynch and established an immediate rapport with the team, relating to their mutual respect for integrity, hard work, and discipline. These fundamental principles and Roger's ethical approach to wealth management resonated with Pat. Upon graduation, he gladly accepted an invitation to join Roger's team full-time and has remained part of it ever since.

With a commitment to financial education and straightforward advice, Pat brings clarity to the ever-changing market conditions. By tailoring strategies to his clients' risk tolerance, time horizon, liquidity needs, and overall investment goals, he builds solid relationships that foster trust and understanding. His process centers on helping clients find their purpose for saving and/or working, then creating a plan to fulfill that purpose. His empathetic nature and keen understanding of the challenges families face make him an invaluable member of the team.

A graduate of the University of Delaware with a Bachelor of Arts degree, Pat is a Certified Financial Planner™, a Chartered Retirement Planning CounselorSM (CRPC™), and holds Series 7 and 66 registrations through LPL Financial.

Pat lives with his wife, daughter, and dog in Massapequa, New York where he enjoys playing soccer and making wine with his family. He also volunteers with Alzheimer's New Jersey, a non-profit organization that provides support and resources to those affected by Alzheimer's disease.

Dave began his financial career at Merrill Lynch in 2015, where he met Roger and became a vital member of his team. As a financial advisor and client advocate, Dave helps individuals and families navigate the complexities of financial decision-making. He is passionate about helping clients succeed and has built a reputation for exceptional service.

Dave focuses on understanding his client's financial priorities and goals, crafting customized investment strategies that help turn aspirations into reality. His approach to financial planning is comprehensive and holistic, connecting all aspects of clients' financial lives to help them prioritize what matters most. Having a well-designed plan for success gives his clients a sense of comfort and security.

A graduate of Rutgers University, Dave is a Chartered Retirement Planning CounselorSM (CRPC™) and holds Series 7 and 66 registrations through LPL Financial.

When not in the office, Dave supports Soles for Souls, a non-profit dedicated to providing shoes for those in need. He lives in Hudson County, New Jersey with his fiancé and dog. He's an avid Philadelphia sports fan and enjoys spending his free time on the golf course.

* The Forbes ranking of Top Next-Generation Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative and quantitative data, rating thousands of wealth advisors born in or after 1980. Advisors are interviewed by telephone and in person to evaluate service models, investing process, experience levels and integrity. Additional factors considered include compliance record, client retention, revenues produced for their firms and assets managed. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receives a fee in exchange for rankings.