

# Aaron Rosen joins AOG Wealth Management, the Advisor for AOG Institutional Diversified Fund (AOGFX)

RESTON, VA, UNITED STATES, May 24, 2023 /EINPresswire.com/ -- AOG Wealth Management today announced that [Aaron Rosen](#) has joined as the Portfolio Manager for [AOG Institutional Diversified Fund \(AOGFX\)](#), effective April 3, 2023. Aaron is a fifteen-year industry veteran who has served in senior roles at several asset and investment management firms, including co-managing a 1940 Investment Company Act-Registered Fund focused on Alternative Assets.

Aaron graduated magna cum laude from the Honors Program of Boston University with a BSBA in Finance and minor in Economics. He is a CFA® Charterholder and currently holds his Series 7, 63 and previously held his Series 65 securities registrations. He

also serves on several external advisory and board roles and is a frequent speaker and panelist at various conferences and events.

AOG Wealth Management CEO, [Fred Baerenz](#) stated “we are delighted to welcome Aaron to our management team as Portfolio Manager. His demonstrated track record of selecting high quality assets, particularly in Real Estate, Private Credit and Private Equity make him a perfect fit for our due diligence team and investment committee.” His assistance will be crucial as we seek to attain our next level of growth and development managing this Fund.”

Aaron noted “I have known Fred Baerenz and Jim Ortlip for many years and have watched their development of AOGFX very closely and with great interest. I believe there is a substantial need for higher-end, institutional alternative investment access in the non-institutional investor



Aaron Rosen, CFA

universe. I am thrilled to be joining their management team and expanding this efficiently-structured opportunity for an underserved community.

Only shares of the AOG Institutional Diversified Fund (“Auction Fund”) are available for purchase by eligible investors and will not be listed on any national securities exchange. The Auction Fund is a closed-end tender offer fund. The form of investment structure for this product is commonly known as a “master feeder” structure. The Auction Fund invests substantially all of its assets in the AOG Institutional Diversified Master Fund which has the same investment objective and identical investment policies as those of the Auction Fund.

An investor should consider the Fund’s investment objectives, risks, and charges and expenses carefully before investing or sending money. This and other important information can be found in the Fund’s prospectus. To obtain a prospectus, please 877-600-3573 or visit [aogfunds.com](http://aogfunds.com). Please read the prospectus carefully before investing.

An Investment in the Fund is speculative and involves substantial risks, including the risk of loss of an investor’s entire investment. Investors may not have immediate access to invested capital for an indefinite period of time and must have the financial ability, sophistication/experience, and willingness to bear the risks of an illiquid investment.

Past performance does not guarantee future results. Diversification does not assure a profit nor protect against loss in a declining market.

The Fund is distributed by UMB Distribution Services, LLC (“UMBDS”). UMBDS is not affiliated with the AOG Institutional Diversified Master Fund or AOG Wealth Management. None of the individuals named in this article are Registered Representatives of UMBDS.

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