

# AOG Wealth Management Promotes Aaron Rosen To Chief Investment Officer of AOG Institutional Fund (AOGFX)

RESTON, VA, USA, May 30, 2024

[/EINPresswire.com/](#) -- [AOG Wealth Management](#), the Advisor for AOG

Institutional Fund and a leading financial services firm located in Reston, VA, is pleased to announce the promotion of [Aaron Rosen](#) to Chief Investment Officer (CIO). In this role, Aaron Rosen will oversee the strategic direction and asset management of AOG Institutional Fund's investment portfolio, seeking to drive growth and maximize risk-adjusted returns for its investors.

With nearly 20 years of experience in asset management, constructing and managing investment portfolios and funds, and a proven track record, Aaron Rosen brings a wealth of expertise to the AOG Institutional Fund. Throughout his tenure as a Portfolio Manager, he has consistently demonstrated exceptional leadership, delivering strong investment results and fostering valuable relationships and new opportunities.



Aaron Rosen, CFA

"I am honored to take on the role of Chief Investment Officer at AOG Institutional Fund," said Aaron Rosen. "I am excited to lead our talented team of investment professionals and continue our commitment to delivering superior performance and bringing exclusive institutional investment access to our investors."

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*Aaron Rosen*

Aaron Rosen joined AOG Wealth Management in 2022 and has played a pivotal role in driving the success of the firm's investment strategies. As CIO, he will be responsible for

setting investment objectives, managing risk, and implementing innovative investment solutions to meet the evolving needs of clients in today's dynamic market environment.



"We are thrilled to appoint Aaron Rosen as Chief Investment Officer," said Frederick Baerenz, President & CEO of AOG Wealth Management, Advisor for the AOG Institutional Fund. "With his extensive experience and deep understanding of the financial markets, he is uniquely qualified to lead our investment team and drive our continued growth and success."

Aaron graduated magna cum laude from the Honors Program of Boston University School of Management with a BSBA in Finance and a minor in Economics. He is a Chartered Financial Analyst CFA®. He also serves part-time on several external advisory board roles and is a frequent speaker and panelist at various conferences and events.

#### IMPORTANT INFORMATION

Investment in the AOG Institutional Fund ("AOGFX Fund") is speculative and involves substantial risks, including the risk of loss of a Shareholder'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. No public market for Shares exists, and none is expected to develop in the future. No guarantee or representation is made that a Fund will achieve its investment objective, and investment results may vary substantially from year to year.

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 call 703-757-8020 or visit [aogfunds.com](http://aogfunds.com). Please read the prospectus carefully before investing.

The AOG Institutional Fund is distributed by UMB Distribution Services, LLC ("UMBDS"). UMBDS is not affiliated with AOG Wealth Management.

Erica Schaeffer  
AOG Wealth Management  
+1 703-757-8020

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