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CONFERENCE

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Roger Levy, AIFA®

Managing Director, Cambridge Fiduciary Services



Roger L. Levy is Managing Director of Cambridge Fiduciary Services, LLC, which provides investment fiduciary consulting and assessment services.

Formerly, Mr. Levy was a founding member and director of Cambridge Financial Services Group prior to the sale of its advisory business to Captrust Advisors in 2013. Mr. Levy has over 25 years' experience in guiding investment advisory clients on how to manage and document their investment process.

Formally educated in England, Mr. Levy practiced law in London as a solicitor before emigrating to the United States. He obtained a Master of Laws Degree from Temple Law School and was the first English solicitor admitted to the Pennsylvania bar. He practiced law in Philadelphia and New York before joining Cambridge.

Mr. Levy has published a number of articles and speaks publicly on fiduciary responsibility. He lives in Scottsdale, Arizona and serves as a Trustee of the Facial Pain Research Foundation.