



CURI CAPITAL

Helping you build true wealth, however you define it

Curi Capital is constantly searching for ways to add value to your life. Whether you are looking for wealth planning and management services for your family or retirement plan solutions for your business, our client-centered approach pinpoints your financial circumstances to help you build a lasting legacy.

OUR SERVICES

WEALTH MANAGEMENT

Comprehensive wealth advisory services designed to help you take control of your financial life.

RETIREMENT PLAN SOLUTIONS

401(K), cash balance, pension, and non-qualified plan consulting services that help your team take the first steps toward a secure retirement.

INVESTMENTS

Public, private, and other alternative investment strategies that can help investors achieve proper diversification.

OUR DIFFERENCE

Delivering valued advice by actively listening

We think big and act small—always delivering a high-touch, personalized experience for you. Founded by physicians to create a nationally recognized and trusted financial advisory firm, we're a community committed to fostering relationships among our team, our clients, and our partners.

For valued advice, visit curicapital.com or contact us at 984-202-2800.

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