04

Curi Capital

CAPITAL

Financial services from the team that knows you.

Building off the success of Curi's first wealth and asset management affiliate (founded in 2016), we established Curi Capital in 2019 to meet physicians' unique financial needs. We offer solutions in three areas:

WEALTH MANAGEMENT

Comprehensive wealth advisory services designed to help you take control of your financial life and build a lasting legacy.

RETIREMENT PLAN SOLUTIONS

A holistic approach to managing retirement plans for physicians and their staff.

PRIVATE INVESTMENTS

Investment strategies not available to the retail investor—critical in today's changing investment landscape. Investment strategies giving retail investors access to a variety of private investments. Curi Capital believes access to these strategies is critical in today's changing investment landscape.

Curi Capital is built on the foundation of two parent companies, Curi and MAI Capital Management—two outstanding organizations with decades of success and leadership teams focused on securing a strong financial future for our member physicians.

During 2019, we deepened our bench by bringing in top industry talent to lead Curi Capital and help make sure it is recognized as a best-in-class financial advisory firm.

We hired **Dimitri Eliopoulos** as Chief Executive Officer, to guide Curi Capital's vision and growth. He brings decades of experience with a large, nationally recognized firm based in Chicago, where he served as President.

Mark Paccione came aboard as Chief Operating Officer and Chief Investment Officer after spending 14 years serving in investment and operational roles at a large registered investment advisor. As COO, he oversees Curi Capital's day-to-day administrative and operational functions, and as CIO, he is responsible for understanding, managing, and monitoring client portfolios.

Frances Cronlund joined as Senior Wealth Strategist, after building the wealth management offering at two well-known banks in the Southeast. She helps clients develop and manage goals-based and comprehensive wealth plans.

Across the organization, the Curi Capital team is built to serve your needs, with a broad range of expertise and talents to help you build true wealth, however you define it. Between the Curi Capital and MAI teams, our clients have access to the following individuals:

12	19	21	19
CFAs	CFPs	CPAs	MBAs

As we look ahead to 2020, we're committed to adding more top leadership and advisory talent to serve the needs of our members and clients.

WEALTH MANAGEMENT

Wealth planning just for you.

Curi Capital's wealth management solutions are built around knowing your goals and preferences, utilizing a full-balance-sheet approach.

OUR WEALTH MANAGEMENT & FINANCIAL PLANNING:

- Comprehensive financial planning
- Discretionary investment management & asset allocation
- Asset protection & risk analysis
- Gifting & legacy planning
- Business succession & transition
- Debt management

We will continue to focus on identifying and adding valuable investment and financial planning resources to address the needs and goals of our members and clients.

INDIVIDUAL ACCOUNTS

68% **Increase year-over-year**
(as of 12/31/19)

RETIREMENT PLAN SOLUTIONS

Helping your team face the future.

Our Retirement Plan Solutions team is designed to help organizations like your medical practice build the best retirement plans for their teams. We offer 401(k), 403(b), pension, and non-qualified plan consulting services.

OUR SERVICES FOR RETIREMENT PLAN DEVELOPMENT:

INVESTMENT MANAGEMENT

FIDUCIARY PROCESS MANAGEMENT

SERVICE PROVIDER MANAGEMENT

PLAN DESIGN OPTIMIZATION

PARTICIPANT ADVICE AND EDUCATION

RETIREMENT PLAN SOLUTIONS ACCOUNTS

1 → **10**

ACCOUNT
IN 2018

ACCOUNTS
END-OF-YEAR
2019

TOTAL ASSETS

$382,000,000

Assets under advisement (as of 12/31/19)

END NOTES

Disclaimer

All insurance products and services are provided by licensed insurance companies that are subsidiaries of Curi Holdings, Inc. Not all insurance products and services are available to all persons in all states. Not all Curi-affiliated companies are mutual companies, and not all Curi members are insured by a mutual company.

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CONTACT US

Headquarters
700 Spring Forest Road
Suite 400
Raleigh, NC 27609
Toll Free: 800-662-7917
curi.com

Philadelphia, PA
1818 Market Street
Suite 2710
Philadelphia, PA 19103
Toll Free: 877-704-8361
curi.com

Camp Hill, PA
1250 Camp Hill Bypass
Suite 180
Camp Hill, PA 17011
Toll Free: 866-379-9816
curi.com

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