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Curi Capital

A team for your, and your practice's, financial needs.

Curi Capital grew dramatically in 2020—in the size and scope of our team, in our ability to serve physicians and medical practices, and in our operational capabilities.

Starting with new leadership from CEO Dimitri Eliopoulos, who joined us in early February, our team then went on to add three more members who brought a broad range of talents. Several of our existing team members were recognized for their performance. One team member was named to the National Association of Plan Advisors' Top Retirement Plan Advisors Under 40 list. Another earned his Certified Financial Planner™ certification.

We enhanced the client experience with more solutions that help us operate as well-rounded, comprehensive wealth managers. We brought on a second custodian, we lowered fees, and we enhanced the quantity and quality of helpful wealth management content going out to our clients.

Finally, we built up our operational capabilities with enhanced product service and solution distribution offerings, including a new customer relationship management system and new trading rebalancing software.

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.

Our team is stocked with people who are equipped with the expertise to serve you well, including individuals with the following professional designations:

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CFPs	MBAs	CFA

WEALTH MANAGEMENT

Wealth planning customized for your unique needs.

At Curi Capital, we use a full-balance-sheet approach to build our wealth management solutions around what you want your money to do for you.

OUR WEALTH MANAGEMENT AND 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.

RETIREMENT PLAN SOLUTIONS

Helping you today to build your team's tomorrow.

Curi Capital’s Retirement Plan Solutions offering helps organizations like your practice build the best possible retirement plan for their teams. Our offerings include 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

CAPITAL

INDIVIDUAL ACCOUNTS

72% Growth
(as of 12/31/20)

TOTAL ASSETS

$382M → **$704M**

TOTAL ASSETS IN 2019 → ASSETS END-OF-YEAR 2020