



Curi Capital



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Dimitri P. Eliopoulos, CEO

My Background

- Born and raised in Chicago
- Married with three daughters (7, 5, and 2)
- 20-year career in wealth management
 - Certified Financial Planner®
 - Certified Private Wealth Advisor®
 - B.S. Finance—DePaul University
 - MBA—Northwestern University Kellogg School of Management
- Previously president of wealth management at RMB Capital

Curi Capital Leadership



Dimitri Eliopoulos, CFP®, CPWA®
Chief Executive Officer



Mark Paccione, CFA, CFP®, BFA™
Chief Investment Officer



Joe Dillon, CFP®
Managing Director, Retirement Plan Solutions



Frances Cronlund CIMA®, CExp™,
CFP®, CTFA
Senior Director, Wealth Planning

Investment Team

Investment selection, performance
monitoring, and ongoing due diligence

15-Person Investment Committee

12 CFAs

21 CPAs

19 CFPs®

Retirement Plan Service Team

ERISA compliance & specialized retirement
plan product and service support

5 ERISA Specialists &

Dedicated Custom Solutions Team

Our Team



DIMITRI P. ELIOPOULOS,
CFP®, CPWA®
Chief Executive Officer



MARK PACCIONE CFA,
CFP®, BFA™
Chief Investment Officer/Chief
Operating Officer



FRANCES CRONLUND
CIMA®, CExp™, CTFA, CFP®
Senior Director, Wealth Planning



CAMERON ROSENOW
Director, Private Wealth



DUNCAN GIBSON
Director, Private Wealth



JOE DILLON, CFP®, CLU®
Director, Retirement Plan
Solutions



CALEB SANDERSON
Manager, Retirement Plan
Solutions



ERIN ROGERS, CFP®
Associate Advisor



KEVIN O'CONNELL
Associate Advisor



BARRETT KNOWLES
Wealth Investment Operations
Specialist

Our Resource Partners



We know money matters.

Like our insurance offerings, Curi Capital was built to serve your unique needs. Our unique understanding of what it means to be a physician helps us see you, your life, and your challenges in ways others simply cannot. Curi Capital's singular aim—to help doctors build true wealth, however they define it.

Private Wealth Management:

- Financial modeling
- Debt and cash flow management
- Asset allocation investment services
- Access to private investments
- Insurance solutions and analysis
- Estate planning and charitable strategy
- College funding strategies
- Tax preparation services

Retirement Plan Solutions:

- Plan design
- Fee benchmarking
- Investment fund line-up analysis
- 3(21) and 3(38) fiduciary services
- Financial wellness and plan participant education
- Student loan management
- Start-up plans

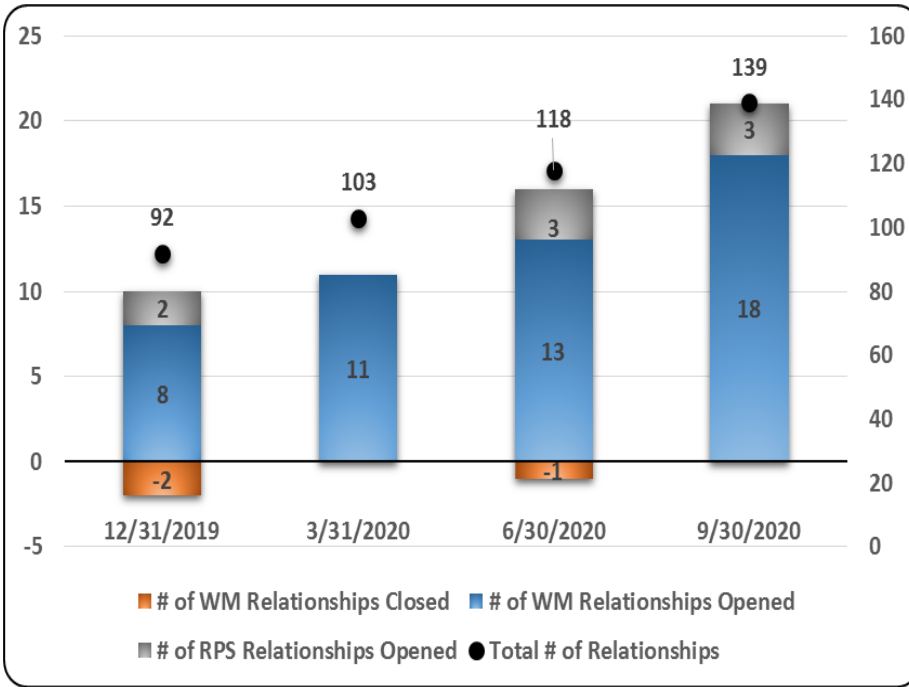
Benefits for Curi Members

Discounted wealth management fee schedule for Curi Capital clients who are Curi members:

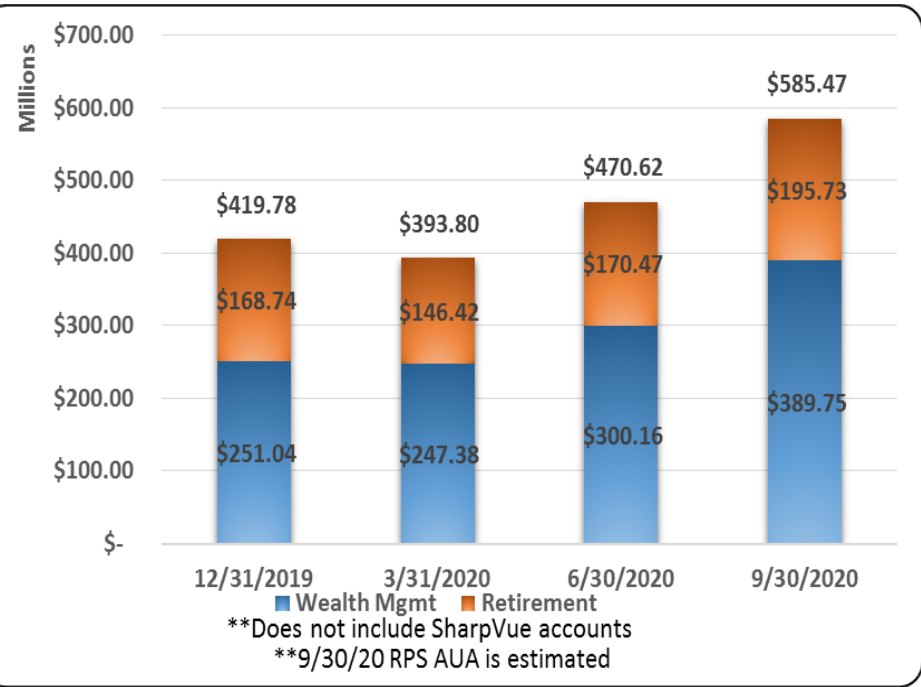
- 0.80% for the first \$3 million of assets
- 0.70% for the next \$2 million of assets
- 0.60% for the next \$5 million of assets
- 0.50% for the next \$10 million of assets
- 0.30% for the balance of assets over \$20,000,000

Growth (as of Sept. 30)

Clients



Assets



Client Case Studies

- **Simplified a family's financial situation**
 - Consolidated assets from four providers to one
 - Reduced portfolio overlap and reduced fees

- **Established charitable, estate, and gift tax planning**
 - Charitable lead trusts
 - Donor-advised funds
 - Intra-family loans leveraging low rate environment

- **Helped young physician families implement proper savings strategies, obtain appropriate life and disability insurance, and establish an estate plan**

- **Partnered with our custodians to obtain an attractive mortgage for a client:**
 - 1.99%, 10-year term

- **Conducted 401k plan design and fee benchmarking study, helping to improve a client's plan**
 - Reduced fees by over 30%
 - Negotiated a better yield on safer/stable value fund option

- **Implemented financial wellness program using digital software solutions to better engage all plan participants**

Planning Considerations—Year-End 2020

- Tax Planning
 - Proper timing to harvest unrealized gains and/or losses
 - Couple charitable contribution deductions with higher-income tax years
- Accelerate bonuses, deferred compensation, or sale of business transactions, anticipating higher tax rates
- Conduct a plan benchmarking analysis of your workplace retirement plan
 - 401k
 - Cash balance plan
- Consider a Roth 401k option for your workplace plan

Our Purpose

We have created a short video detailing Curi Capital's purpose and how it affects everything we do for our clients:



<https://www.youtube.com/watch?v=TjGFI7MuMb0&feature=youtu.be>

