

A large, dark blue, semi-transparent graphic on the right side of the slide features a close-up of a person's eye with light-colored irises, looking directly at the viewer.

## **Financial and Operations Update**

# Financial Highlights

## Curi Holdings

Total assets = **\$1.08 billion** **+10%**

Capital base = **\$570 million** **+2%**

## Curi Insurance

Total assets = **\$655 million** **+9%**

Capital base = **\$338 million** **+2%**

Operating cash flows = **\$14 million** **-22%**

Premium volume = **\$68 million** **+3%**

Claims & defense costs = **\$30 million** **+19%**

Pre-tax income = **\$23 million** **-16%**

## Curi Investments

Total assets = **\$282 million** **+2%**

Capital base = **\$241 million** **+1%**

Real estate gains = **\$14 million** **+137%**

Gains on other investments = **\$1 million** **-35%**

Wealth & asset mngt income = **-\$645k** **+57%**

Pre-tax income = **\$11 million** **+240%**

# Honorable Mentions

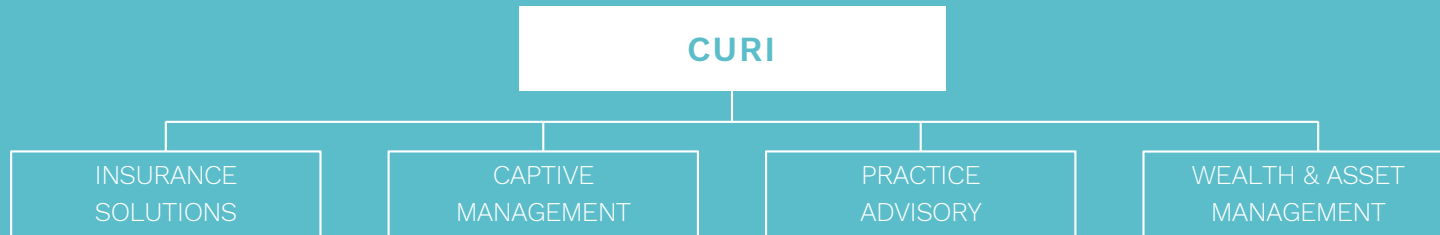


- **Property-Casualty Ward's 50 Companies** — We analyzed the financial performance of nearly 2,900 property-casualty insurance companies domiciled in the United States to identify the top performers. [Learn more.](#)

Curi Recognized as Top 50 Property & Casualty Insurer by Aon's Ward Group - Curi  
curi.com

YOUR COMPANY

# We're here to serve you. Always.



**Our products and services are built to help you and your practice**—from insurance and investments to business services and emotional and physical wellness.

**By staying curious about you**, we're able to build the best solutions to meet your needs—now and well into the future.

CURI<sup>®</sup> ADVISORY

# We curate business solutions to help you thrive and prosper.

**Every year, operating a medical practice seems to get more challenging.** Your main focus is your patients. Curi's main focus is you. With more than four decades of physician input, we know what it takes to keep your practice running strong. You tell us your problem—we'll source the best solutions.



## Curi Advisory Specialties:

- Strategic guidance
- Operational expertise
- Financial analysis
- Payor contract negotiations
- Data and analytics
- Reputation management

# Evolution of Curi Capital

2010-2015



2016

SHARPVUE  
— CAPITAL —



Lee Roberts  
Managing Partner



Doug Vaughn, CFA  
Managing Partner

2019

SHARPVUE  
— CAPITAL —

 Curi® CAPITAL



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