Curran Financial Partners - Complete Plan Review (CPR) Planning Process

We are a trust-based advisory firm, meaning, we don't use typical selling techniques you may have experienced in the past such as pressuring you to make decisions or chasing you with multiple "follow-up" calls. We believe in trust and open communication for the purpose of determining if we are best suited to work together as a partnership for the long term.

Visit #1: Discovery

Do we like & trust one another? Can we help one another?

- Confidentially review your unique financial situation. Discuss your specific retirement dreams, goals, concerns and issues.
- Introduce Curran Financial Partners retirement planning services and expectations, including:
  - Retirement Plan Design
  - Investment Management Services
  - Social Security Optimization & Tax Efficient Planning Strategies.

Visit #2: Planning

Review of your customized retirement plan

- What is your sustainable monthly retirement income?
- Can we potentially create a larger retirement nest egg?
- What level of risk are you taking and what fees are you paying?
- Review of your current investment approach and explore alternative, superior solutions.

After our proposed solutions, a decision to "hire" Curran Financial Partners happens here ...

Visit #3: Mutual Commitment

Fine tune your retirement plan and begin implementing solutions

- Answer any questions and review any recommended adjustments made to your customized retirement plan.
- Determine your overall asset allocation. Discuss the pros and cons of all of your investment options.
- Explain the transition process and handle the necessary paperwork to come on board as a client.

Ongoing Evaluation and Retirement Plan Monitoring

Dynamically adjust your retirement plan based on changes in your life, economy, and investment accounts

- Periodic Retirement Plan & Account reviews to monitor your investment performance and make plan adjustments.
- Actively review and update E-Money application so your entire financial picture can be reviewed quickly and efficiently.
- Inform you of the state of financial markets, product innovations, and recommend investment allocation adjustments.