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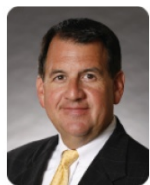


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Richard J. Durkee

LUTCF

Member since	10/23/2009
Member through	10/27/2014
Company	Coastal Financial Planning group, LLC
Website	http://www.cfpgroup.biz
Industry	Financial Services

Description

Richard J. Durkee is President and founder of the Coastal Financial Planning group, LLC. Rick, as he is known by his clients and business associates, specializes in retirement income planning. The foundation of his recommendations for clients include a common sense and safe approach to retirements challenges through a money management system that promotes safe and secure investments with the objective of a fair market return with a high degree of confidence. Rick is committed to providing exemplary client service as evidenced by the accessibility he provides of himself for his clients. Ethical standards and professional knowledge are the cornerstone of his practice and can be heard weekly on his radio programs, Money Matters and Retire Right, Saturday mornings on News Radio 94.3 WSC.

Education

Rick graduated with the degree of Bachelor of Science in Business Administration/Marketing from the University of South Carolina in 1981. He has also earned the accreditation of the Life Underwriter Training Council with the designation of Life Underwriter Training Council Fellow (LUTCF). He is also an investment advisor representative and holds a series 65 license.

Associations

Rick is an approved member of the National Ethics Association an independent organization of insurance and financial advisors who have maintained an exemplary record of business ethical standards.

Investment advice is offered by Horter Investment Management, LLC, a Registered Investment Adviser. Insurance and annuity products are sold separately through Coastal Financial Planning group, LLC. Securities transactions for Horter Investment Management clients are placed through Pershing Advisor Solutions and Trust Company of America.

References

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Robert Polk-Attorney 843-852-9000



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