

Curtis Capital: Financial Services Overview

Welcome to Curtis Capital, where we specialize in providing comprehensive financial advisory services and personalized retirement planning for wealthy individuals and families. Our mission is to help our clients make smart investment decisions, maximize their wealth, and secure their financial future. Below is a summary of our services, including the highlighted strategies we are actively promoting.

Core Services

1. Financial Advisory Services

At Curtis Capital, we believe in creating customized strategies to meet the unique needs of our clients. Our financial advisory services include:

- **Wealth Management:** Personalized investment strategies designed to grow and preserve wealth over time.
- **Portfolio Management:** Diversification and optimization of investment portfolios to achieve long-term financial goals.
- **Tax-Efficient Investment Strategies:** Identifying opportunities to minimize tax liabilities while growing assets.
- **Estate and Legacy Planning:** Guidance to ensure your wealth is efficiently passed on to the next generation.

2. Retirement Planning

We specialize in creating and managing retirement strategies tailored to your lifestyle and long-term goals. Our services include:

- **Retirement Income Planning:** Structuring investments to generate a stable income during retirement.
- **401(k) Rollovers:** Transitioning employer-sponsored plans into more flexible and advantageous investment accounts.
- **Retirement Risk Management:** Protecting your portfolio against inflation, market volatility, and other potential risks.

Highlighted Services

1. 401(k) to Roth IRA Conversions

Curtis Capital has extensive expertise in helping clients transition their 401(k) funds into Roth IRAs. This strategy offers several benefits, including:

- **Tax-Free Growth:** Once funds are in a Roth IRA, all future gains are tax-free.
- **Tax-Free Withdrawals:** Qualified distributions from Roth IRAs are not taxed, providing long-term savings.
- **Estate Planning Advantage:** Roth IRAs can be passed to heirs with fewer tax implications than traditional retirement accounts.

We carefully analyze your financial situation to determine the most tax-efficient approach to convert your 401(k) while minimizing the immediate tax burden.

2. Hedging Strategies with Options

To further protect and grow our clients' portfolios, Curtis Capital is introducing advanced hedging strategies using options. These strategies include:

- **Investment Protection:** Options can act as insurance for your investments, limiting potential losses during market downturns.
- **Income Generation:** By employing covered calls or cash-secured puts, we create additional income streams on assets that typically do not produce income.
- **Risk Mitigation:** Our hedging strategies reduce overall portfolio risk while maintaining upside potential.

Our team of specialists works closely with clients to integrate these strategies seamlessly into their overall investment plan.

Why Choose Curtis Capital?

- **Expert Guidance:** Our advisors have years of experience and a deep understanding of financial markets and retirement planning.
- **Tailored Solutions:** Every strategy we implement is designed with your specific goals in mind.

- **Proactive Communication:** We keep you informed every step of the way, ensuring that your financial plan adapts to your evolving needs.
- **Client-Centric Approach:** We prioritize transparency, trust, and long-term relationships.

Next Steps

If you're ready to take control of your financial future, contact us today to schedule a consultation. We'll discuss your goals, review your financial situation, and create a personalized plan that sets you on the path to success.

At Curtis Capital, your future is our focus.