Your time is valuable and staying on top of your financial situation can be exhausting. You need someone to manage the details—We can help.

Financial Planning

When's the last time you felt confident about your Retirement plan? With so many variables and moving parts, it can be exhausting to stay on…

Investment Management

Account types we manage: IRAs – Traditional, Roth, SEP, SIMPLE, Inherited Taxable accounts – Trust, Individual, Transfer on Death…

Portfolio Tracking & Oversight

Most investors have accounts at more than one institution. Outside the primary relationship with an advisor, they might have a company 401k plan…

Latest Insights

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HOW CONFIDENT ARE YOU?

CLOSING THE BEHAVIOR GAP

OUR INVESTMENT PROCESS

IF YOU GIVE, CONSIDER APPRECIATED STOCK

GIVE, GROW, GRANT

PLANNING FOR RETIREMENT

REAL ESTATE SOLUTIONS

MANAGE RISK

About Curtis Advisory Group

Curtis Advisory Group, LLC is boutique wealth management firm located in Santa Barbara. We are focused on serving families and business owners who value having an independent and objective investment advisor to help them navigate the many financial decisions that must be made over a lifetime.

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Legal

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