
FT
FINANCIAL TIMES
Top Financial Advisers 2019
FT 300 Ranking June 2019

Financial Plan?

This survey was conducted by Princeton Survey Research Associates International.*

1,002
Household decision makers.

52%
Planning for current or future retirement.

32%
Have a Comprehensive Financial Plan

19%
Had a financial professional with a fiduciary responsibility create a plan, specifically Certified Financial Planner™ professional or a Registered Investment Advisor

*To view the survey article source, Click Here or download The 2013 Household Financial Planning Survey and Index.

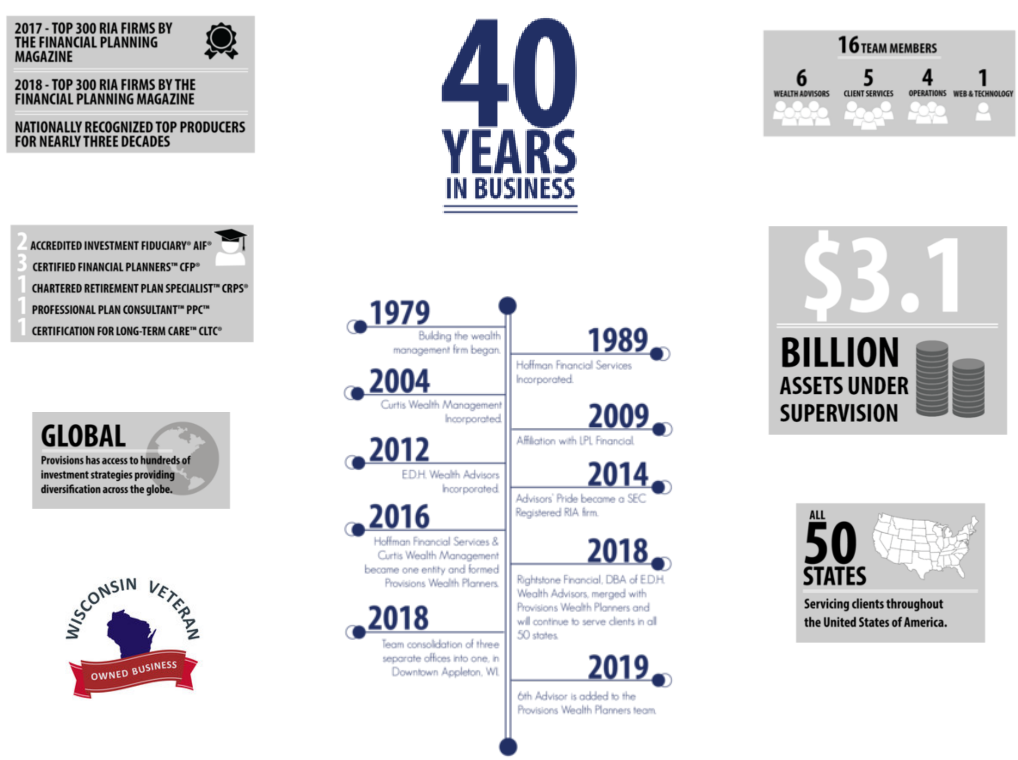
BEING A FIDUCIARY

Provisions Wealth Planners acts as a fiduciary in many of our client relationships. A fiduciary is any person or institution who has the power to act on behalf of another in situations that require great trust, honesty and loyalty. When acting in a role of fiduciary, we are bound to act in your best interests and must set aside our own personal motives in favor of you.

to act in your best interest for all our individual retirement accounts as well as all of the company sponsored retirement plans in which we are the named financial advisor.

LEARN MORE

OUR HISTORY



MEET OUR EXECUTIVES

MARTY A. CURTIS, CFP®, AIF®

PRESIDENT & CEO

With a strong desire to provide her clients with the best proactive services available and by listening carefully to the needs of her clients, Marty is able to

PAUL R. HOFFMAN, CFP®

CORPORATE STRATEGIST & CHIEF COMPLIANCE OFFICER

Paul is a family man and professional business leader. His strong work ethic and business knowledge has made him a

ERIC D. HALL, AIF®

EXECUTIVE VICE PRESIDENT

Eric feels strongly that the only way to serve his clients effectively is to actively work with individuals who bring additional knowledge to the table. He credits his work moto is and has always been “Clients first”.

READ MORE ABOUT MARTY

years. Today, Paul is the leader and creative mind behind Advisors' Pride, a successful financial Advisors' support system. Paul is extremely proud of Advisors' Pride and he works hard at maintaining his personal commitment to excellence.

READ MORE ABOUT PAUL

one of the reasons he is able to help lead his clients and his company through life's ups and downs. Eric is both humbled and proud to be able to serve his clients and community, just as he has served our Country.

READ MORE ABOUT ERIC

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