



**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

2017 - TOP 300 RIA FIRMS BY THE FINANCIAL PLANNING MAGAZINE

2018 - TOP 300 RIA FIRMS BY THE FINANCIAL PLANNING MAGAZINE

NATIONALLY RECOGNIZED TOP PRODUCERS FOR NEARLY THREE DECADES

**40**  
YEARS  
IN BUSINESS

**16** TEAM MEMBERS

6 WEALTH ADVISORS    5 CLIENT SERVICES    4 OPERATIONS    1 WEB & TECHNOLOGY

2 ACCREDITED INVESTMENT FIDUCIARY™ AIF™

3 CERTIFIED FINANCIAL PLANNERS™ CFP®

1 CHARTERED RETIREMENT PLAN SPECIALIST™ CRPS®

1 PROFESSIONAL PLAN CONSULTANT™ PPC™

1 CERTIFICATION FOR LONG-TERM CARE™ CLTC™

**GLOBAL**

Provisions has access to hundreds of investment strategies providing diversification across the globe.



**\$3.1**

**BILLION** ASSETS UNDER SUPERVISION

**ALL 50 STATES**

Servicing clients throughout the United States of America.



# 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 motto 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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