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Who We Are

At Curran & Lewis, there is no hidden agenda (costs and fees are fully disclosed in our ADV), and there are no third-party influences to color our financial and investment recommendations. We do not represent any product or any company; we represent only the client. This allows us to concentrate on providing the highest level of personalized service and to offer professional, independent, unbiased advice.

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Investment Philosophy

You can't predict the future. While this may seem obvious, Wall Street and the financial media would like us to believe otherwise. We are constantly bombarded by brokers, advisors, and the financial media attempting to convince us that they have a crystal ball for determining market direction. "Wall Street" wants us to pay attention to their economists, analysts, earnings estimates, sales projections, etc.

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Our Process

Our process puts you first. Instead of presenting you with the latest greatest investment that "can't miss," our approach of goals-based investing allows us to determine the most appropriate investment approach for your individual needs. We want to work with you to gain a full understanding of your financial situation and be able to provide you with an investment strategy that not only meets your needs, but also one that you will understand.

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