



Joseph P. Curran

Investment Professional



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Education

Trinity College Hartford, CT
Masters in *Financial Economics* 2004
 Concentration: Portfolio Management
 Research Project: Asset Liability Management (ALM)
 Thesis: Term Structure of Interest Rates (Yield Curve)

University of Connecticut Storrs, CT
Bachelors in *Economics* 1997

Licenses

CRD #3024167 FINRA Series:

- 3 Commodities
- 7 General Securities
- 9/10 General Securities Supervisor
- 63 State Blue Sky Law
- 65 Investment Advisor
- 24 Principle

CT Insurance:

- Life, Health, and Variable Annuity

Joe is a Financial Planner and Portfolio Manager who has been in the investment management industry since 1998. He is the owner and founder of Breachway Investments, a “Fee-Only” Registered Investment Advisory firm. He is also the author of: [The Process of Investing](#).

A Connecticut native originally from West Hartford, Joe currently resides with his wife and their two children in the coastal town of Wakefield, RI.

Experience

Breachway Investments President / Investment Advisor	2019 – Present West Hartford, CT
Merrill Lynch Resident Director / Vice President	2009 – 2019 Glastonbury, CT
Smith Barney Second Vice President / Financial Advisor	2005-2009 Providence, RI
CIGNA / CSCCU Senior Investment Specialist / FI Portfolio Manager	1999-2005 Hartford, CT

Professional Designations

- CERTIFIED FINANCIAL PLANNER™ (CFP®)
 - Boston University, Certificate in Financial Planning
- Certified Portfolio Manager (CPM®)
 - Columbia University, Portfolio Management Program
- Chartered Retirement Planning Counselor™ (CRPC®)
 - College for Financial Planning
- Passed CFA Level I Exam