

FIDUCIARY  
WEALTH  
MANAGEMENT  
DESIGNED FOR YOU

## CONTACT

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## ABOUT US

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**Breachway Investments is an Independent Registered Investment Advisory firm that specializes in Financial Planning and Portfolio Management.**

**As a Fee-Only Fiduciary, we manage assets with our clients' best interests as the only priority. Our goal is to help you achieve your goals.**



### **JOSEPH P. CURRAN, CFP®, CPM®** **President / Investment Advisor**

Joe Curran is a seasoned Financial Planner and Portfolio Manager who has been in the investment management industry since 1998.

Building on his experience working for major Wall Street firms such as Smith Barney and Merrill Lynch, Joe develops customized investment strategies for both families and institutions.

Joe graduated with a bachelor's degree in Economics from the University of Connecticut and subsequently earned a master's degree in Financial Economics from Trinity College.

**His professional designations include his Certified Financial Planner (CFP)<sup>TM</sup> certification; Certified Portfolio Manager credential (CPM); and Chartered Retirement Planning Counselor<sup>SM</sup> professional designation.**

A Connecticut native originally from West Hartford, Joe currently resides with his wife and two children in the bucolic town of Simsbury.

## DISCLOSURE

Breachway Investments, LLC is a Registered Investment Adviser. This brochure is solely for informational purposes. Advisory services are only offered to clients or prospective clients where Breachway Investments, LLC and its representatives are properly licensed or exempt from licensure. Past performance is no guarantee of future returns. Investing involves risk and possible loss of principal capital. No advice may be rendered by Breachway Investments, LLC unless a client service agreement is in place.

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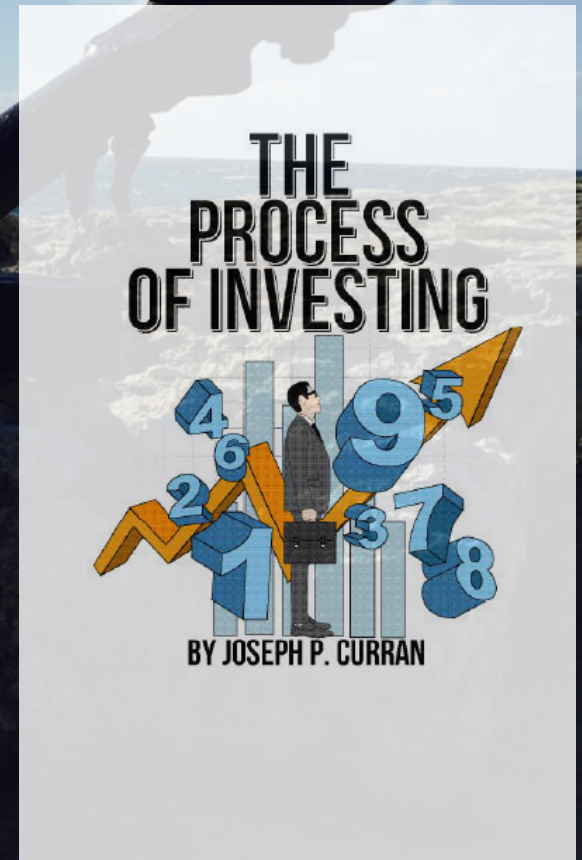
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## OUR PROCESS

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### THE BOOK

To learn more about Breachway Investments, please check out Joe's book: "The Process of Investing." Available on Amazon and at other retailers.



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