



ADVISOR JOINS CHARTER OAK RETIREMENT AND INVESTMENT SERVICES

Thomas J. Curtin Is A Seasoned Financial Professional With Over 25 Years of Industry Experience

FOR IMMEDIATE RELEASE

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Waterford, CT – December 20, 2018 – Thomas J. Curtin, an experienced investment professional with extensive financial industry experience, has joined Charter Oak Retirement and Investment Services* as its newest Financial Advisor.

Curtin has held senior management positions in the asset management and life insurance industries and also has 15 years of experience as a bond trader, portfolio manager and operations specialist.

Charter Oak Retirement and Investment Services has experienced strong growth over the past several years and its growing staff now includes two Financial Advisors and a Vice President of Wealth Management in addition to support staff.

Charter Oak Retirement and Investment Services offers a broad range of investment and insurance products and services, as well as financial and retirement planning. Its offerings include IRAs, mutual funds, managed accounts, stocks and bonds, life insurance, long-term care and annuities.

Curtin is a graduate of Central Connecticut State University in New Britain with a Bachelor of Science degree in finance. He holds a Chartered Retirement Planning Counselor designation and is FINRA securities registered as well as insurance licensed.

Curtin has a strong history of working with credit union members, as well as their family and friends and has access to a wide variety of investment and insurance products. His professional services include wealth management, portfolio management, financial and life insurance planning, retirement income planning and education funding.

“My primary objective is helping clients reach their retirement goals,” Curtin said. “My job is to help you, whatever your age, create a sound financial strategy for the lifestyle you want to live in retirement,” he said. “It’s easy to get started.” Curtin is available for no-cost, no-obligation consultations and can be reached via email at Thomas.Curtin@cunamutual.com or via telephone at 860.446.3477 or cell phone at 860.502.5111.

Charter Oak is eastern Connecticut’s largest credit union with assets of \$1.1 billion as of September 30, 2018. Charter Oak offers an expansive and convenient network of 16 branches serving New London and Windham counties, providing one of the largest and most convenient branch networks of any financial institution serving eastern Connecticut. For more information about Charter Oak’s broad range of products and services, please visit any of our convenient branches, or visit our website at CharterOak.org, or contact our Call Center at 860.446.8085 or 800.962.3237.

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