



## **Kurtis R. Kuyat, RFC**

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As a Financial Advisor, Kurtis R. Kuyat takes a long-term approach to the planning process to help make sure that his clients are on the right path to retirement. Kurt is committed to providing his clients with the highest level of personal services over the long-term.

Kurt's philosophy is as always "give straight advice." He believes that today's investors have very high expectations demanding a different investment strategy approach, one that elevates their portfolio beyond one-dimensional product strategies and leverages the experience of highly skilled financial professionals. Kurt will present you with the confidence, alternatives and options available to you.

Smart investing begins with a plan - one that reflects unique needs and goals, the time needed to achieve them and the attitude toward risk.

To maintain a relationship, Kurt's ongoing role in your financial future revolves around several key steps:

1. **Analyze** - Assist in designing a financial plan based on your objectives, time horizon and willingness to take risk.
2. **Implement** - Present products to help meet your objectives
3. **Monitor** - Regularly monitor your portfolio and recommend changes when applicable. In addition, Kurt will keep a close analysis of ongoing tax liability options.
4. **Report** - Report your results periodically in detail with his analysis and recommendations.

Kurt lives in Export, Pennsylvania with his wife, Judy and their three sons Kyle, Billy and Sean . In his time away from the office, Kurt enjoys golfing, exercising, attending the children's sporting events and when he has time, relaxing with the family.