PACIFIC LIFE

STEPHANIE J. CURRY, CLU®, ChFC®, CFP®, CASL™, CRPC®, AIF®, CRC®
ASSISTANT VICE PRESIDENT

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Stephanie is Assistant Vice President of the Retirement Resource Group in Pacific Life's Annuities & Mutual Funds Division overseeing the area responsible for assisting brokers in individual case design, implementation and conducting seminars for continuing education for insurance, CPE and CLE as well as client informational seminars.

Stephanie has 30 years of industry experience, which includes advanced marketing consulting and sales for both Chubb Life and Aetna. Stephanie's experience encompasses a variety of financial positions from individual inside and outside sales, wholesaler, advanced life consultant, and advanced annuities consultant. Stephanie has sold a broad spectrum of financial service products including: annuities, mutual funds, life insurance, and property casualty products. Her focus for the past 15 years has been on charitable giving and retirement planning strategies. Stephanie is also a certified continuing education instructor in all states. Stephanie is editor of the Retirement Sections Newsletter for the Society of Financial Services Professionals and is on the advisory committee of the National Marine Sanctuary Foundation.

Business Building Services

Stephanie delivers presentations, seminars and workshops on:

- Annuities & Mutual Funds and Life Insurance
- Portfolio Optimization
- IRAs
- Retirement Income Accumulation
- Small Business Retirement Plans
- Retirement Income Planning
- Estate and Wealth Transfer
- Business Continuation
- Philanthropic Planning
- 529 Plans

Specialized Training

In addition to a bachelor's degree in psychology from the University of Rhode Island, Stephanie holds a Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC), Certified Financial Planner (CFP®), Chartered Advisor for Senior Living (CASL®), Certified Retirement Planning Councilor (CRPC), Accredited Investment Fiduciary (AIF®) and a Fellow of the Management Institute (FLMI), professional designations.

Personal Information

Stephanie enjoys hiking, bike riding, golf and attending the theatre and jazz concerts.
