

THE LEGACY FUND

We're in it for your outcome.

Your commitment to practicing quality medicine and your partnership with Curi have made us one of the most financially sound professional liability companies in the nation. The Legacy Fund is a member benefit program designed to provide our eligible physician members with a return on their investment in Curi.

Each year, Curi may allocate funds to member savings accounts based on the financial performance of the company. Practices can choose to establish Legacy Fund accounts as individual accounts or as a corporate account. Legacy Fund accounts are paid out upon certain designated events, including qualifying retirement, to either the individual account holder or to the practice as determined by your practice.

We encourage you to visit curi.com/resource/the-legacy-fund/ to learn more about this tax-deferred member savings program. For more information, contact our TLF support team at TLF@curi.com or 984-884-3777.

Legacy Fund allocations are based upon Curi's annual performance and are not guaranteed.

Curi recommends that individual physicians, or the practice, contact their accountant or tax consultant for advice regarding the taxation of Legacy Fund distributions.

