

COR Financial Partners Launches New Digital Platform to Help Americans Build Safer Financial Futures

COR Financial Partners introduces a virtual-first approach to retirement planning, life insurance, and legacy protection for today's modern family.

SAN DIEGO, CA, UNITED STATES, July 21, 2025 /EINPresswire.com/ -- COR Financial Partners, a modern financial services firm dedicated to protection-first planning, has officially launched its new digital platform designed to help Americans plan smarter, retire safer, and leave lasting legacies.

“

Families don't just need a financial plan. They need someone who truly cares about their future. That's the heart behind everything we do at COR Financial Partners.”

*Angie Lopera, Co-Founder,
COR Financial Partners*

The launch comes at a time when many families are navigating uncertainty around retirement income, taxes, and rising costs of living. COR Financial offers a virtual-first approach that combines personal guidance with powerful tools, making quality financial planning accessible and easy to understand.

“We built COR Financial Partners to give everyday families what they truly need—clarity, education, and real protection,” said Mario Fragomeno, Co-Founder of COR Financial Partners. “It's not about chasing trends—it's about building a foundation that lasts.”

A Platform Built for Real People:

At the heart of COR Financial Partners' platform is a user-friendly website featuring Sophie, an intelligent virtual assistant who helps visitors explore services, download eBooks, and schedule consultations. The firm also provides a growing video library and free educational tools to help clients make informed decisions with confidence.

Key service areas include:

Retirement Income Planning – Customized plans using indexed annuities and tax-advantaged strategies to generate secure lifetime income.

Life Insurance, Long-Term Care & Protection – Modern policies, including IULs, are designed to

protect income, grow assets, and leave a legacy.

Legacy & Wealth Transfer – Strategic planning for families who want to pass down wealth efficiently and tax-advantaged strategies.

Virtual Financial Workshops – Interactive online events that demystify complex topics like tax-free retirement, IULs, and career pathways in finance.

A Personal Approach, Nationwide

Although based in San Diego, California, COR Financial Partners serves clients virtually across the United States. Every client receives personalized recommendations tailored to their goals—not one-size-fits-all advice. From young families starting to retirees protecting their nest egg, COR Financial Partners delivers guidance that fits.



Co-Founders Angie Lopera and Mario Fragomeno

Visitors can access the firm's digital tools and download a complimentary copy of the eBooks [Smart Growth & Safe Returns](#) and [Peace of Mind. Built to Last](#) directly through the platform.

Now Accepting Clients and Advisors

In addition to serving families, COR Financial Partners is actively expanding its team. The firm offers training, mentorship, and a meaningful career path for individuals passionate about helping others achieve financial security.

"Financial planning is personal, and so is our approach," said Angie Lopera, Co-Founder of COR Financial Partners. "We're building a team of advisors who lead with heart and operate with integrity."

To learn more, watch our educational videos, download our free resources, or schedule a complimentary consultation.

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