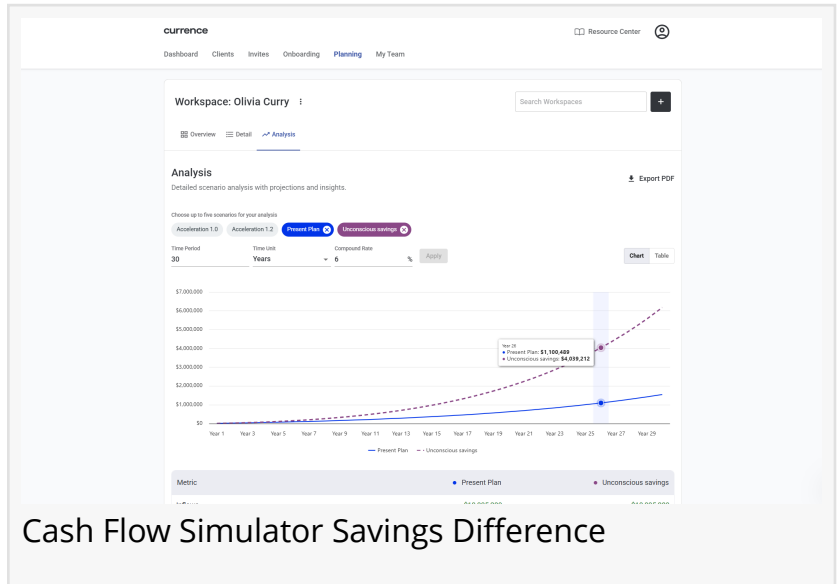


Currence Launches Cash Flow Simulator, the First Onboarding Tool Built to Support the IUM™ Planning Model

Currence launches the Cash Flow Simulator, the first onboarding tool built for Income Under Management™, helping advisors create personalized income strategies.

NEW YORK, NY, UNITED STATES, December 2, 2025 /EINPresswire.com/ -- Currence, the financial technology company pioneering the [Income Under Management™](#) planning model for advisors, today announced the launch of its Cash Flow Simulator, a first-of-its-kind onboarding tool that helps financial advisors deliver personalized income strategies from day one. The release marks a major milestone in Currence's mission to transform how advisors guide, educate, and retain clients through income-focused planning.



Cash Flow Simulator Savings Difference

“

The Cash Flow Simulator gives advisors a powerful way to create trust in the very first meeting.”

David Mozeika, Currence founder & CEO

Unlike traditional platforms that center on asset accumulation alone, Currence is the only system designed for managing a client's income as the foundation of their financial plan. With this launch, advisors can now seamlessly integrate the Income Under Management™ philosophy with a guided cash-flow onboarding experience, helping clients quickly understand where their money goes, how their decisions compound, and what

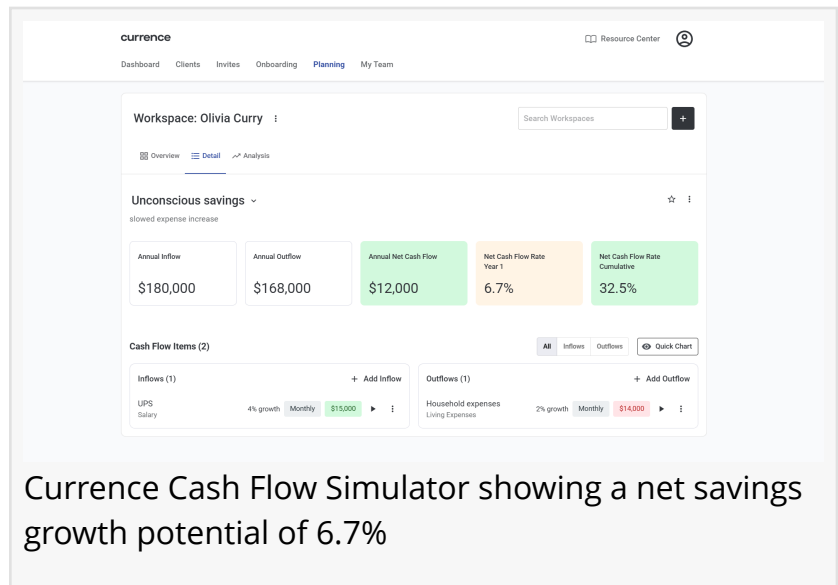
steps will lead to long-term income security.

“Asset management is no longer enough. Clients want clarity and control today, not just later,” said David Mozeika, Currence founder & CEO. “The Cash Flow Simulator gives advisors a powerful way to create trust in the very first meeting. It shows clients that their income can be directed with intention and strategy, not guesswork. That’s the future of planning, and it starts

with Income Under Management.”

The Cash Flow Simulator: Designed for Breakthrough Onboarding Moments

The Cash Flow Simulator allows advisors to guide clients through a real-time snapshot of their income, expenses, and disposable cash flow. By visualizing decisions on the spot, advisors can uncover planning opportunities faster, reduce overwhelm, and begin long-term strategy work immediately.



Key advisor benefits include:

- Faster clarity and buy-in with visual onboarding conversations
- Personalized income strategies built in minutes
- A structured, repeatable client experience that drives action earlier
- Aligned planning recommendations that support lifetime income outcomes
- The tool is now available inside the Currence portal for financial advisors.

A Full Ecosystem for the Modern Income-Focused Advisor

The Cash Flow Simulator strengthens the broader Currence ecosystem, which works to educate and empower financial advisors. As part of this initiative, the [Currence Certified Income Advisor™ \(CIA\) Program](#) is the only advisor training program built around Income Under Management™.

CIA members receive weekly live training, marketing templates, one-on-one and group coaching support, plus client-ready resources to accelerate implementation.

This integrated education-plus-technology approach gives advisors something the industry has lacked: a complete system for helping clients align behavior, cash flow, and income strategy.

“We didn’t want to just build another simulator tool,” said Aashay Shah, Currence Chief Product Officer. “We built a guided system for advisors, enabling education, coaching, and software to work together to help advisors change outcomes, not just produce reports.”

About Currence

Founded in 2022, Currence is a financial technology company redefining how advisors serve clients. The company’s Income Under Management™ model is a novel concept to support clients

to save first. By combining software, education, and coaching, Currence gives advisors a powerful blueprint for helping clients gain control of their income, make confident financial decisions, and build a secure financial future. To learn more, visit <https://livecurrence.com/>

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