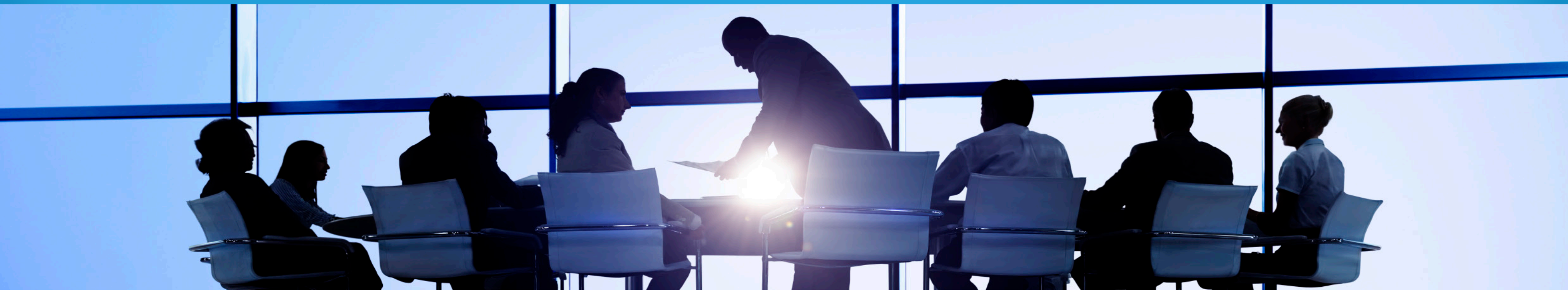

EXECUTIVE PLANNING

Disciplined Investments ("DI") provides comprehensive financial planning for corporate executives. With limited time commitment, executives receive assistance in organizing their financial affairs, increasing retirement preparedness, and optimizing their corporate benefits. The company benefits from increased executive productivity and retention.

- Fee-only independent wealth consulting
- Coordination with all executives' tax, legal, and investment advisors
- Optional tax preparation seamlessly provided by HoganTaylor LLP

DI meets with each executive quarterly to help define their financial goals, navigate options, assist in implementation, and monitor for changes.

FINANCIAL PLANNING AND CONSULTING

DI offers a broad range of services to create comprehensive financial plans designed to meet our clients' personal financial objectives. Working collaboratively with external investment advisors, attorneys and other professionals, we are able to coordinate all aspects of a client's financial plan. Services and areas of concentration include:

- Defined Contribution Plans
- Executive Planning
- Legacy Planning
- Charitable & Planned Giving Strategies
- Retirement Planning
- Sudden Wealth
- Social Security Planning
- Insurance Consulting
- Education Funding
- Investment Advice/Education
- Estate Planning
- Income Tax Planning

PROFESSIONAL FEES

DI takes its fiduciary responsibility seriously. Without commission, referral or soft-dollar arrangements, we operate on a fee-only basis to ensure everyone's interests are aligned with those of the client. And because each client is unique, every relationship is tailored to meet the client's needs. Services range from hourly consulting to comprehensive wealth management.

To maintain our objectivity, DI is compensated directly by the client.

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An individual with moral and legal responsibility to act with undivided loyalty to the client. That's the tenet that drives HoganTaylor's Disciplined Investments team. Their job is to provide you with a balanced, impartial perspective with your financial wellbeing as the goal.

DISCIPLINED INVESTMENTS LEADERSHIP

Adam J. Leavitt, CFP®

Adam J. Leavitt has been constructing wealth solutions for a diverse clientele of individuals and institutions for 15 years. He is a CERTIFIED FINANCIAL PLANNER™ professional and a registered financial advisor with the National Association of Personal Financial Advisors. He received a degree in Finance from Oral Roberts University and an MBA from Oklahoma State University. Adam is a Leadership Tulsa graduate and a father of four.

Mathew R. Bacon

Mathew R. Bacon has been serving high net worth investors for over 19 years, specializing in portfolio management and comprehensive financial planning. Prior to joining Disciplined Investments, LLC, he worked with Charles Schwab & Co., Inc., in Dallas and Tulsa as Vice President of Private Client Services. Mathew received a degree in Finance from the University of Oklahoma and is the proud father of two.

Jeffrey R. Small, CFP®

Jeffrey R. Small has been in the Financial Services industry for the last 16 years working with individuals and foundations in the areas of planning and asset allocation strategies. Prior to joining Disciplined Investments, he worked at UBS Financial Services Inc. in Indianapolis as a Client Associate and spent one year at Corporate Consulting Group in Tulsa as an Analyst. Jeffrey received his Bachelor's degree in Financial Planning and Counseling from Purdue University and is the proud father of two.

Scott Logan, CFP®

Scott Logan has been helping people make smart financial decisions for over 20 years, specializing in portfolio management and holistic financial planning. Prior to merging his practice with Disciplined Investments, he owned and operated Asset Planning Solutions, a portfolio management and holistic financial planning practice. Scott is a CERTIFIED FINANCIAL PLANNER™ and a Registered Financial Advisor with the National Association of Personal Financial Advisors.

ABOUT HOGANTAYLOR

HoganTaylor is one of the largest public accounting firms in the Oklahoma and Arkansas region. In addition to Wealth Management services, HoganTaylor has many other practice groups made up of knowledge experts in important, highly specialized areas of accounting.

SERVICES

- Accounting Solutions
- Advisory
- Assurance
- Business Valuation
- Employee Benefit Plans
- Human Capital
- Litigation Support
- Outsourced CFO Services
- Risk Assurance
- Tax
- Wealth Management

INDUSTRIES

- Collective Investment Funds
- Construction
- Energy
- Financial Institutions
- Information Technology
- Insurance
- Manufacturing & Distribution
- Nonprofit
- Retail
- Transportation

BDO ALLIANCE USA

HoganTaylor is an independent member of the BDO Alliance USA and is able to access the resources of BDO USA, LLP and its trusted network throughout the world.

AN INDEPENDENT MEMBER OF BDO ALLIANCE USA

CONTACT INFORMATION

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