



## 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.



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.



Melissa J. Young

Melissa J. Young is the Operations Manager at Disciplined Investments, LLC. She brings nearly 20 years of experience in office administration, with 15 years dedicated to the Financial Services industry. Prior to joining DI, she worked as the Office Coordinator at Stout Risius Ross, Inc., a financial advisory firm in Washington, DC. She received her bachelor's degree from Oklahoma State University.

Melissa is active with her church, volunteering with the elementary and middle school programs.

## ABOUT HOGANTAYLOR

HoganTaylor is one of the largest public accounting firms in Oklahoma and Arkansas. 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	Information Technology
Advisory	Litigation Support
Assurance	Outsourced CFO Services
Business Valuation	Risk Assurance
Employee Benefit Plans	Tax
Human Capital	Wealth Management

### INDUSTRIES

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

## 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.



## CONTACT INFORMATION

For additional information about Disciplined Investments, please contact us at 918.388.2690 or [support@ht-di.com](mailto:support@ht-di.com)



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