

AT THE HEART OF DISCIPLINED INVESTMENTS

July 2019

At Disciplined Investments, one of our passions is to make families stronger.

We do this by providing well-thought-out, evidence-

based and client-centered investment and wealth management solutions to our clients. Possibly the most enjoyable aspect of our days is getting to know many of our clients on a personal level, and having the honor to share

in your lives as well as those close to you.

Because we've grown into the Oklahoma City market, and have added a few new faces in Tulsa over the last few years, we want to give all of our clients a chance to

become more familiar with our team.

In the third installment of "At the Heart of Disciplined Investments" we want you to get to know Adam Leavitt out of our Tulsa office.

ABOUT ADAM



Adam Leavitt has been constructing wealth solutions for a diverse clientele of individuals and institutions for more than 15 years. He specializes in comprehensive financial planning and asset management with considerable experience regarding trusts, qualified retirement plans, non-profits, and private equity. He is a CERTIFIED FINANCIAL PLANNER™ professional and a registered financial advisor with the National Association of Personal Financial Advisors.

WHO IS THIS ADAM GUY REALLY?

Though he claims to be in constant pursuit of balance, Adam more often seems to be swinging far off base—one way or the other. Support the family, engage civically, create value, appreciate talent and beauty, nurture the body and spirit, give charitably, have fun, and somehow STAY SANE. Fingers crossed.

Adam has six children. His wife, Hayli, is a saint. He prefers "doing" over "spectating" and some may find some of his activities too risky. Adam justifies this risk taking on the fact that he is relatively risk averse when investing. Since 2001, Adam has provided holistic

financial planning and access to capital markets for his clients as a fiduciary. After establishing his own financial services company, Adam joined DI in 2006 confident it would be a more effective way to accomplish his mission—to help change the financial services industry. He loves working with clients and spends a considerable amount of time on firm organization; helping ensure the fees, compensation, and delivery of investment advice is not only in the clients' best interest, but scalable within the Firm.

