

# AT THE HEART OF DISCIPLINED INVESTMENTS

August 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 fourth installment of "At the Heart of Disciplined Investments" we want you to get to know our newest Investment Advisor Representative, Annie Tran.

## ABOUT ANNIE



Annie Tran is a Senior Advisor at Disciplined Investments. She helps clients develop & implement comprehensive financial plans that address their unique goals and circumstances.

Annie has considerable experience working with high net worth family groups on tax compliance, estate planning, and trust operations. She earned a Bachelor of Science in Accounting from the University of Oklahoma.

## WHO IS THIS ANNIE REALLY?

Annie Tran is a Tulsa native and OU grad who joined the Tulsa office of Disciplined Investments in August 2018. She's a familiar face for many of us! You might have even seen her or worked with her before, since she was with HoganTaylor as a tax manager for over 10 years. She left briefly to join a large family office and help her brother with his firm. Maybe it was "the one who got away" or "the toxic ex-boyfriend", but she just couldn't stay away for long and is so elated to be "home"! While she does not plan to return to public accounting, Annie still maintains her CPA license and plans to pursue her CFP certification.

Annie's surprisingly handy, and she's even tiled floors and built patios. She has plans to lovingly (albeit slowly) renovate her 80-year-old home during her free time - much to the dismay of her daughters, Sophie (14) and Lily (12), and her rescued fur babies, Flash and Charlie. Annie loves finding new things to experience with her girls through food, travel and volunteerism. She has varied interests and enjoys learning new things. Currently, she's picking up the game of golf and has become very adept at driving the golf cart and "accidentally" forgetting to update her scorecard. You'll almost always find her in a dress and heels, but

she has also grown to love camo and off-roading. Some of her favorite things to do are exploring downtown Tulsa, being active outdoors, and spending time with her favorite people - especially if food is involved. Not only does she REALLY love food, but she's a respectable cook as well. Her eggrolls are practically legendary!

During Annie's time in public accounting, she focused on individuals and not-for-profit entities. Her experience in these areas, along with the exposure she had in the family office, adds a unique dimension to the DI team. We're so glad to have her back home!

