

AT THE HEART OF DISCIPLINED INVESTMENTS

February 2020

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 new markets, 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 sixth installment of "At the Heart of Disciplined Investments" we want you to get to know Matt Bacon, our Wealth Manager from our Tulsa office.

ABOUT MATT



Matt Bacon has been serving 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. Matt has significant experience with very diverse and complex estate planning issues, saving and investing strategies, private equity offerings, and real estate investments.

WHO IS THIS MATT GUY REALLY?

Matt doesn't really need an introduction, but we're going to give him one anyway! He's not really a native to any state, as he has family all over the country--New England, Michigan, Texas, California, Florida, and of course Oklahoma. This might explain why he feels so comfortable traveling without an itinerary, much to his wife's chagrin. But being in Oklahoma the last 20 years, he has become quite the "Sooner". You could say he has that going for him, unless you're a 🤠!

As many of you know, Matt was diagnosed with Stage 4 Colon Cancer in 2014. What you don't know is the impact this guy had on our family here at Disciplined Investments, Hogan Taylor, and our community. Matt always has a smile on his face--his positive attitude is truly infectious. If you sit down and talk with him, he will affirm how much of a blessing this diagnosis was on him and his family. Right before his first surgery, Matt said "Until you are forced to look inward at your own mortality, you never really know the true impact that you can have on someone's life". This is a daily driver for him with his friends and family

(and we all know, his clients are more like an extension of his family).

Matt is a devoted father and husband. At home Matt is often outnumbered and outvoted by his wife of 22 years, Amie, and his daughters, Olivia (17) and Madeline (13). Even his two dogs join forces to outvote him, but he doesn't mind though! To help him through the craziness he calls "life", he has his love of reading and triathlon (swimming, biking, and running). In fact, he's currently training for IRONMAN Tulsa coming May 31st. He's also trying to come to grips with the fact that his Olivia is getting ready to head off to college soon. There will for sure be many tears shed over the coming months.

