



TRINITYTM
STRATEGIC WEALTH



WHAT WE DO

We help you pursue your life and financial goals with greater clarity and confidence.

WHO WE SERVE

What successes and accomplishments have brought you the most satisfaction? What dangers threaten your future dreams?

Whether you are a **Retiree, Corporate Executive, Business Owner or Widow(er)**, we will ask you to provide insight into your life's mission and financial goals, and help you create and implement a customized action plan. **Getting to know you is essential**, because financial planning shouldn't just be about dollars and cents.



THE FINANCIAL FREEDOM PROCESS™

This guided process is designed to help you develop strategies to mitigate financial risk, properly manage your assets and build a lasting legacy.

FINANCIAL FREEDOM STARTER KIT

Assess your current situation & clarify your goals

FINANCIAL FREEDOM DISCOVERY SESSION

Evaluate your current dangers, opportunities & strengths

LIFE & FINANCIAL STRATEGY SESSION

Develop a step-by-step plan designed for achieving your goals



THE FINANCIAL FREEDOM PROCESS™

Upon completing The Financial Freedom Process™, you will have:

- A **comprehensive plan**, including sufficient income objectives, for your retirement,
- **Organized and diversified investments** that help meet your specific objectives,
- A **complete estate plan** that includes charitable giving strategies,
- Information about and **strategies for avoiding dangers** that threaten your future,
- **Frequent contact** with an advisor to help you stay on track, and
- **Confidence about your future** to pursue your lifetime vision.



FINANCIAL FREEDOM PLAN

Document a detailed blueprint outlining tools, strategies & timelines



FINANCIAL FREEDOM BUILDER

Work with our experts to achieve effective & timely plan implementation



FINANCIAL FREEDOM PROGRESS SESSIONS

Ensure you stay on track with regular reviews with our financial planners

WHO WE ARE

Founded in 1996, Tulsa Wealth Advisors has a dedicated team of **Financial Advisors** that hold highly regarded designations such as CERTIFIED FINANCIAL PLANNER™ professional, and MASTER PLANNER ADVANCED STUDIES®. We seek to provide personalized financial solutions to help clients choose the appropriate tools and strategies designed to pursue their particular life and financial goals.

Our team includes a **Chartered Financial Analyst®** that collaborates with financial advisors on current market research, trend analysis and product placement; a **Client Services** department dedicated to efficiently addressing your questions and resolving account maintenance needs; a **Marketing & Education** division that keeps clients informed with quarterly workshops, personalized and timely newsletters and various other communication materials; and an extensive **Support Staff** committed to ensuring your experience—on the phone, in the office, virtually or through the mail—is beyond satisfactory.



ASSET MANAGEMENT

Both Dynamic and Strategic Asset Allocation strategies employ a diversified investment approach built around Modern and Post-Modern Portfolio Theory for conservative, moderate or growth objectives. Both fee-based strategies match active and passive managers with complimentary styles. Accounts are then periodically rebalanced back to the basic allocation, resulting in less trading and lower overall expenses.

Dynamic Asset Allocation

- Constructed for a basic allocation strategy per client Investment Policy Statement
- Conservative, Moderate, Growth, and Income strategies
- Utilizes active managers for each asset class
- Designed for changing market cycles
- Sensitive to economic and market trends
- Pursues technical opportunities and employs protective risk management

Individualized Separately Managed Accounts

- Includes stock and bond portfolios
- Provides complete transparency
- Client owns the individual positions

Strategic Asset Allocation

- Constructed for an allocation strategy per client Investment Policy Statement
- Conservative, Moderate, Growth, and Income strategies
- Matches active managers with complimentary styles
- Includes managers with a flexible investment mandate
- Includes a tactical manager

Guided Stock Models

- Core Growth, Equity Income, and Equity Income Plus strategies
- Concentrated stock portfolios with 20–28 positions
- Combines a top-down sector approach with bottom-up stock selection
- Well diversified across sectors and industries



Investing involves risk and you may incur a profit or loss regardless of strategy selected, including diversification and asset allocation. Any opinions are those of Tulsa Wealth Advisors and not necessarily those of RJFS or Raymond James. Investments mentioned may not be suitable for all investors. Please note that the portfolios provided above are general and investment decisions should only be made after a discussion with the appropriate professional about your individual situation.

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, CFP® (with plaque design) and CFP® (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

In a fee-based account clients pay a quarterly fee, based on the level of assets in the account, for the services of a financial advisor as part of an advisory relationship. In deciding to pay a fee rather than commissions, clients should understand that the fee may be higher than a commission alternative during periods of lower trading. Advisory fees are in addition to the internal expenses charged by mutual funds and other investment company securities. To the extent that clients intend to hold these securities, the internal expenses should be included when evaluating the costs of a fee-based account. Clients should periodically re-evaluate whether the use of an asset-based fee continues to be appropriate in servicing their needs. A list of additional considerations, as well as the fee schedule, is available in the firm's Form ADV Part 2 as well as the client agreement.



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