HoganTaylor
WEALTH

Adam Leavitt, CFP®

Wealth Manager

Tulsa
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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.

Representative Experience

- Constructed investment policy statements for individuals, corporations, and non-profits
- Managed client portfolios more than $50 million
- Worked with executives to create 10b5-1 plans and stock option exercise strategies
- Provided testimony as an investment expert witness in court
- Provided participant education to qualified retirement plan

Certifications & Honors

- CERTIFIED FINANCIAL PLANNER™

Professional & Civic Affiliations

- National Association of Personal Financial Advisors, Registered Advisor
- City of Tulsa Municipal Employees' Retirement Plan, Board of Trustees, 2013-Present
- Community Health Connection, Inc., Secretary 2012-Present
- Juvenile Diabetes Research Foundation, Board member 2012-2013
- Emergency Infant Services, President of the Board 2009 – 2012
- Youth Services of Tulsa, Board member 2008-2009
- Leadership Tulsa, Class 35

Education

- B.S., Finance, Oral Roberts University, Magna Cum Laude
- M.B.A, Oklahoma State University

Speaking Engagements

- Presenter, Economy & Investing, HoganTaylor's Year-End CPE Program, December 2015
- Presenter, Investing Prudently: Active vs. Passive, State Chapter of OSCPA (Oklahoma Society of CPAs), November 2013