

## 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

**Please Note: Limitations:** *Neither recognitions by unaffiliated publications, media, or other organizations, nor the achievement of any professional designation, certification, degree, or license, or any amount of prior experience or success, should be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results if HoganTaylor Wealth is engaged, or continues to be engaged, to provide investment advisory services.*